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TOURIST INFORMATION CENTRE STUDY

VOLUME I: REPORT

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PREFACE

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The report and its conclusions is the sole responsibility of the consultants, and does not necessarily reflect the opinions of those who assisted during the course of this investigation and the Federal and Provincial Governments which funded the study.

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Department of Regional
Industrial Expansion

Ministry of Industry
and Small Business
Development

Ministry of Tourism

TABLE OF CONTENTS

		Page
	Preface	
	Executive Summary	ES-1
1.0	**Introduction**	1-1
2.0	**Methodology**	2-1
3.0	**Existing Tourist Information Centre Systems in BC**	3-1
3.1	Description	
3.1.1	Distribution and Location of Centres	3-1
3.1.2	Information and Promotional Material Provided by Centres	3-7
3.1.3	Role of the Ministry of Tourism	3-8
3.1.4	Role of the Regional Tourist Association	3-9
3.1.5	Role of the Federal Government	3-11
3.1.6	Scope of Operation	3-12
3.1.7	Operating Budgets and Funding Sources	3-15
3.1.8	Staff Selection	3-20
3.1.9	Training and Experience of Staff	3-22
3.2	Effectiveness of the Current Program	3-24
3.2.1	Objectives	3-24
3.2.2	Approach	3-25
3.2.3	Evaluation of Objective 1	3-29
3.2.4	Evaluation of Objective 2	3-33
3.2.5	Consideration of Other Objectives	3-37
3.2.6	Local Objectives for Tourist Information Centres	3-38
4.0	**Market Trends**	4-1
4.1	General Characteristics of Tourist Information Centre Users	4-1
4.1.1	Low Dispersion	4-1
4.1.2	Proportion of Visitors Who Use Tourist Information Centres	4-1
4.1.3	Residence	4-2
4.1.4	Pre-Holiday Planning Needs	4-3
4.1.5	Information Desired	4-4
4.1.6	Fees for Information	4-5
4.1.7	Facilities Desired	4-5
4.1.8	Party Size and Transportation	4-6
4.1.9	Spending Patterns	4-7
4.2	General Tourism Trends as They Relate to Tourist Information Centres in BC	4-8
4.2.1	Trends	4-8
4.2.2	Implications for Tourist Information Centres	4-10

TABLE OF CONTENTS

		Page
5.Ø	**Information Centres in Other Jurisdictions**	
5.1	Tourist Information Centre Systems in Other Provinces	5-1
5.1.1	Overview	5-1
5.1.2	Administration	5-1
5.1.3	Problems	5-6
5.1.4	Fees for Service	5-8
5.1.5	Standardization	5-9
5.1.6	Use of Video Presentations	5-9
5.1.7	Accreditation and Brochure Policies	5-1Ø
5.2	Tourist Information Centre Systems in England and the Netherlands	5-11
5.2.1	Overview	5-11
5.2.2	Network Objectives and Criteria -- England	5-12
5.2.3	Structure and Support -- England	5-13
5.2.4	Network Objectives -- The Netherlands	5-16
5.2.5	Structure and Support -- The Netherlands	5-16
6.Ø	**Computer Applications in Tourist Information Centres**	6-1
6.1	Computerized Information Systems in TICs Across Canada	6-1
6.2	Assessment of Current Experience with Computerized Tourism Information Databases	6-5
6.3	Available Alternatives	6-7
7.Ø	**Directions for Change**	7-1
7.1	Problems at the Centre Level	7-1
7.1.1	Signage and Other Physical Problems	7-1
7.1.2	Funding	7-2
7.1.3	Staff	7-1Ø
7.1.4	Community Support	7-11
7.2	Problems with the Tourist Information Centre System	7-12
7.2.1	Plan for Growth	7-12
7.2.2	Control of Service	7-13
7.2.3	Other Issues	7-14
7.3	Benefit-Cost Analysis	7-15
7.4	Basic Options for the TIC Program	7-19

TABLE OF CONTENTS

		Page
8.0	**Recommendations**	8-1
8.1	Objectives and Goals	8-1
8.2	Strategy	8-3
	8.2.1 Network Concept	8-3
	8.2.2 Standards for the Network	8-7
	8.2.3 Funding	8-10
	8.2.4 Promotion of the TIC Network	8-13
	8.2.5 Network Plan for the Future	8-13
8.3	Computer Applications	8-19
8.4	Preparation for Expo 86	8-21
8.5	Design Concepts	8-23
	8.5.1 Entry Signage	8-23
	8.5.2 Design Guidelines	8-26
	8.5.3 Provincial/Regional Centre	8-27
	8.5.4 Local Centre	8-28
	8.5.5 Unmanned Centre	8-32
	8.5.6 Satellite Centre	8-37
	8.5.7 New Centres	8-38

TABLES

3.1	Tourist Information Centres	3-2
3.2	Concentration of Tourist Information Centres by Region in BC	3-6
3.3	Centre Size, Volume, and Staff Levels	3-13
3.4	Inquiry Loads	3-14
3.5	Operating Budgets for Sample of Information Centres	3-16
3.6	Funding Sources for Local Centres	3-19
3.7	Achievement of Objective 1	3-30
3.8	Industry Opinions on Objective 1	3-32
3.9	Achievement of Objective 2	3-34
5.1	Tourist Information Centre Systems Outside BC	5-2
5.2	Comparison of Number of Tourist Information Centres and Travel Receipts by Province	5-4
7.1	Centre Observations	7-3
7.2	Funding Alternatives Considered by Interviewees	7-8
7.3	Evaluating the Effectiveness of Four Hypothetical Information Centres from the Provincial Perspective	7-17
8.1	Long-Run Tourist Information Centre Locations	8-16
8.2	Comparison of Actual and Proposed Tourist Information Centre Locations	8-17
8.3	Tourist Information Centre Sites With Tourist Distribution Roles	8-18

TABLE OF CONTENTS

Page

FIGURES

8.1 Travel Routes of Non-Resident Visitors to BC 8-15
8.2 Entry Signage 8-24
8.3 Guidelines for Entry Signage 8-25
8.4 Provincial/Regional Centre: Site 8-29
8.5 Provincial/Regional Centre: Design 8-30
8.6 Provincial/Regional Centre: Plan 8-31
8.7 Local Centre: Design 8-33
8.8 Local Centre: Plan 8-34
8.9 Unmanned Centre: Design 8-36

VOLUME II: APPENDICES

VOLUME III: A GUIDE TO PLANNING AND OPERATING A TOURIST INFORMATION CENTRE

EXECUTIVE SUMMARY

This study consists of three volumes:

Volume I:	Report
Volume II:	Appendices
Volulme III:	Guide to Planning and Operating a Tourist Information Centre.

The main report reviews the operation and role played by the existing system of Tourist Information Centres (TICs) in BC. The intent of this volume is to point the way toward an integrated network which provides a consistently high quality of service, makes the best use of the limited resources available, and is easily identified by the visitor.

The Current System

The current system consists of 10 provincially operated centres 133 independently operated centres (including satellite sites), and 1 centre operated by a Regional Tourist Association, which are spread throughout BC. Tourist Region A (Vancouver Island) and Tourist Region B (Southwestern BC) have the highest number of centres, 39 and 37 respectively. The provincial government also operates 5 additional information outlets -- one in Alberta, 3 in the USA, and 1 in London, England.

The BC operated centres are mainly located at major entry points to the province. Their efforts are concentrated on the distribution of promotional material addressing BC, the nine tourist regions, the provincial parks, as well as local areas. Their literature covers attractions and features of general interest, but specifically excludes promotional brochures covering individual hotels, motels, restaurants and other commercial establishments.

The local centres are generally operated by the local Chamber of Commerce. Their efforts are focused on the presentation

of local or regional tourist offerings and provision of a display area for brochures from tourist oriented businesses. While there is no consistent policy among local centres regarding the acceptance of brochures for display, the object is generally to promote the interests of local sponsoring businesses.

The scope of centre operations varies substantially throughout the province as the following examples suggest:

- Robson Square (BC Centre) and GVVIC (Local Victoria Centre) employed 14 and 15 travel counsellors, respectively, during the 1983 summer season and at peak periods serviced in excess of 1,000 personal tourist party inquiries per day. (Both of these centres operate on a year-round basis.)

- Dawson Creek (BC Centre) and New Hazelton (Local Centre) employed 3 and 4 travel counsellors, respectively, during the 1983 summer season and at peak periods serviced up to 50 personal tourist party inquiries per day. (Both of these centres operate during the summer season only.)

The budgets also vary substantially. Some centres provide a very basic tourist service, while others are involved with extensive local promotional activities. In our sample of centres, the wage bill varied from 65% to over 80% of the operating budget. A typical local 3-month summer operation which used 3 travel counsellors and was housed in a building separate from the Chamber of Commerce office might operate on an $11,000 budget (before management salaries or capital cost allowances). Most centres rely heavily on provincial or federal wage funding assistance (at the $3.65 - $3.95 per hour level) for their travel counsellors. The balance is provided by municipal sources and the sponsoring organization.

The training of travel counsellors at local centres is also

inconsistent. In our sample, 63% of the travel counsellors had completed the 5-day Travel Counsellor's Techniques course administered by the Ministry of Tourism. While all counsellors at provincial centres must complete the course prior to being hired, most local centres hire their counsellors untrained. Some centres have been unable to cover the cost of sending a new employee on a week training program. There also appears to be a need for a better regional or local familiarization program at some local centres.

We attempted to measure the centres' success at achieving the following tourist information centre program objectives:

1. To enhance the quality of the visitor's experience

2. To increase the money spent in BC by encouraging the addition of attractions to the visitor's schedule and by encouraging the extension of the visitor's holiday in BC

3. To enable tourism activities to be carried out without environmental degradation

4. To enable tourism activities to be carried out without an unnecessary level of inquiries being directed to other citizens

5. To encourage tourists to make return trips to BC, particularly during the off-season.

Our research indicates that the centres are meeting Objective 1. The centres provided the type of information desired by 96% of our visitor sample. Despite the variance in appearance and training of staff, there was no significant difference in the level of visitor satisfaction in our sample. The staff were considered to be friendly and knowledgeable by 98% of our visitor sample.

Our research indicates that the centres have a positive effect on visitor spending patterns. After conservatively accounting for the sample biases, we expected that approximately 30% of the tourist party inquiries are influenced in a manner leading to tourism expenditures in BC which would not have otherwise occurred. However, we conclude that there is room to improve effectiveness in this area.

In examining the other objectives, we have concluded that:

- the centres in general do not play a major role in reducing potential environmental degradation

- the centres are successful in reducing the load of inquiries which would otherwise be handled by other citizens

- the centres in general could improve their promotional emphasis of off-season tourist activities. (We were unable to measure the effectiveness of encouraging return visits.)

Market Trends

Our research indicates that:

- 50% of the visitors to tourist information centres want information regarding places to visit and features to see

- 45% of the visitors to tourist information centres want directions

- 43% of the visiors to tourist information centres want accommodation information.

We also conclude that the availability of telephones,

washrooms, a refreshment facility (e.g., a drinking fountain), and a rest area are important features for many tourists. The visitors in our survey found large scale wall maps very helpful, particularly when these illustrated the local street patterns, or the location of services and attractions.

The tourism market is becoming increasingly competitive and sophisticated. Tourist information centres in BC must be viewed as competitive in terms of price and quality with those in other areas. This places a higher priority on using well-trained staff who possess a sound knowledge of BC's many tourist features.

While the BC Accommodation Guide and the BC Road Map are well received, we conclude that it would be inappropriate to charge a fee for this type of material at the present time.

Despite an expectation of growth in person-trips and tourist expenditures for the period 1978-1982, no overall growth occurred. The expansion of the out-of-province market segment was completely offset by a decrease in resident travellers in BC. Continued growth of the non-resident segment should improve utilization of the centres services because this segment has a higher tendency to use centres than do BC residents.

Tourist Information Centres in Other Jurisdictions

Our contacts with the other nine Canadian provinces indicate that each has a system of tourist information centres somewhat like BC. The expressed problems of inadequate funding, signage, and staff training at local centres are similar to those present in the BC system. Standardization in appearance has been attempted to varying degrees (e.g., from common building designs to unique buildings identified by a common flag-sign format) only at the provincial centre level. Ontario, which has a large network (291 centres),

uses an accreditation procedure to set minimum standards for service and facilities.

England and the Netherlands have well regarded tourist information systems. They use a close-knit network of centres coordinated through strong regional tourist organizations. Each country uses a three-tiered system consisting of:

National/Provincial Centres	- handling national, regional and local information
Regional Centres	- handling regional and local information
Local Centres	- handling local information.

Like Ontario, they have a criteria for membership in the network. They also have a special logo which identifies all locations as a network member and a system of flags which adds to image consistency.

Computer Applications

Telidon computer terminals were installed in both BC and locally operated tourist information centres (as part of a major field trial) to allow tourists to access information on a self-service basis. These installations were generally viewed as unsuccessful because:

- the terminals were not sufficiently "user friendly"
- visitors preferred the personal contact with a counsellor
- the response time was slow (in comparison to that of a travel counsellor)
- many visitors also wanted a hard copy of the information.

Computerization in the tourist information centres in other provinces is most advanced in Alberta where an investment in excess of $300,000 has been made in specialized software

alone. Saskatchewan has developed a major tourist information data base and is planning an on-line system. Manitoba is considering and New Brunswick is testing major computer applications.

In the BC centres, the most appropriate use of computer technology would be as a productivity enhancement tool for travel counsellors. The travel counsellors would use the terminals to provide fast, easy reference to a tourist information data base on an exception basis. Most of the requests would be handled in the current manner using the standard brochures. If the province requires a tourist reservation service, the large financial investment required and the efforts needed to retain an impartial position suggest that development by the private sector should be encouraged.

Problems at the Centre Level

In 43% of our centre sample, the signage was considered to be poor. Both approach and on-site signage affect centre use levels and therefore needs attention in BC. Some less common physical problems include:

Parking	- insufficient space reserved for visitors - inadequate space for oversized vehicles to manoeuver
Size	- lack of reception area - lack of display space
Location	- low visibility from the major tourist route - difficult access
Appearance	- need for repair or maintenance of building exterior - cluttered interior area.

Funding can be a problem for local centres. The uncertainty of government wage subsidies for travel counsellors has encouraged some centres to overstate the number of staff required when applying for subsidies. For other centres, the uncertainty of funding from all levels of government (including municipal sources) causes delays in hiring and difficulties in providing staff training. Some centres also have difficulty raising enough money to maintain their desired level of staff in the off-season. Our research indicates that the government subsidization of travel counsellors' wages is vital to the operation of many centres.

Problems at the System Level

The current system is composed largely of autonomous local centres. At the present time, there is no coordinating or managing body and no mechanism to control quality of service or staffing levels. There is no set of operating guidelines or standards for centre design or content. Despite the apparently satisfactory level of service being provided, the lack of a masterplan for development has allowed duplication of services at several locations and a less than optimal use of limited resources. The current level of government funds available for local centre support is fixed. Thus, as the system grows and as costs of operation increase, the level of real financial support for each centre becomes lower.

Benefit-Cost Analysis

We used standard benefit-cost analysis to assess and develop some guidelines for several aspects of the tourist information centre system. Our conclusions are as follows:

- There are small-volume centres in the system which may be viewed as uneconomical. I.e., the costs of running the centre are greater than the extra income that is generated for BC residents as a result of the centre's operation.

- The economic viability of a centre from a provincial perspective can be questioned when the operating budget exceeds total personal tourist party inquiries by a factor of 2 or more. For example, if a centre has an operating cost of $11,000, then it should handle at least 5,500 tourist party inquiries.

- A new centre can be justified from a provincial perspective only if there is clear evidence that it will not significantly reduce visitations at existing centres.

- From an economic view point, the economic benefits generated by the current system barely cover the economic costs of operation (i.e., the system is operating very close to the margin.)

Recommendations

(a) Objectives

Retain the objectives of:
- enhancing the quality of the visitor's experience
- increasing the amount of money spent in BC by visitors
- encouraging visitors to make return trips.

De-emphasize the formal objectives of:
- enabling tourism to be carried out without environmental degradation
- enabling tourism to be carried out without an unnecessary level of inquiries being directed to other citizens.

Where applicable, these two objectives will be accomplished as a result of the existence and operation of the centres.

Establish a network of centres which will provide assurance that a specific level of service and facilities

are provided to tourists and which can be coordinated so as to achieve goals benefiting tourism and BC as a whole. Goals for this network should include:

- developing an identity through the consistent use of signs, flags and banners
- increasing the public awareness of services available from centres
- monitoring (and increasing) the level of centre usage
- improving the quality of facilities
- encouraging the use of technological advances in information presentation
- encouraging local centres to become more financially self-sufficient.

(b) Network Structure

Build a network composed of:

- provincially operated centres which continue in their current role
- Local A Centres which will disperse tourists throughout the region and promote the local opportunities
- Local B Centres which will concentrate on local oriented promotional activities (much like the role currently played by many of these centres)
- a coordinating committee which will set the admission standards and reporting requirements, review applications for admission, direct growth and upgrade efforts, and promote the network concept. The coordinating committee should be composed of representatives from:
    - 2 Ministry of Tourism
    - 1 BC Chamber of Commerce
    - 2 Regional Tourist Associations
    - 2 Local tourist information centre sponsors

  The latter four representatives should be from at least three different tourist regions and the whole committee should perform a major communications role

for all parties involved in the network.

Establish a set of minimum standards for member adherence. These should cover:

- service
- information displays
- hours of operation
- training
- record keeping/reporting
- sign usage

(We have provided a suggested set of criteria in section 8.2.2.)

Establish a set of benefits which members receive. (We have provided a suggested set of benefits in section 8.2.2.)

(c) Funding

Continue government support of travel counsellors' wages, but:

- make network membership a prerequisite
- allow the coordinating committee to recommend allocation of wage funding among the 9 regions and to recommend a maximum dollar subsidy per counsellor
- announce the recipients of the program funds prior to March 15.

Discontinue the operating grant program and set up a dollar-for-dollar cost-sharing program which encourages network members to upgrade their facilities. The first application of this program should focus on upgrading onsite signage.

(d) Network Promotion

Design a network logo which will be used to identify all members of the network.

Publicize the "?", the logo, and the network in the BC Accommodation Guide.

(e) Design

Use the design concepts developed in this study (and illustrated in this report) when replacing or building the next BC centre. Abbotsford is a logical site to demonstrate the new 1,600 sq ft design format.

(f) Computer Application

Consider developing a computerized information system for use (by travel counsellors) in BC operated centres. A system of communicating micro computers would appear to be the best option for the current needs of the centres. Such a system would be particularly appropriate for use in conjunction with Expo 86 activities.

(g) Preparation for Expo 86

Consider arranging with a private vendor to provide a temporary accommodation reservation service made available through major information centres in the Lower Mainland during Expo.

Establish a large, temporary, portable or dismantleable format, BC operated centre across from the main entrance to the Expo site.

Undertake a study to identify and develop the marketing tools needed to prepare for and distribute the Expo visitors around BC.

1.0 INTRODUCTION

There are 144 tourist information centres (TICs) in operation during the summer months throughout the Province of British Columbia. Operating expenses for these centres are met in part by funding from federal and provincial governments, from local levels of government, and from private organizations. Despite the interrelated goals and activities of all parties, a consistency of service and presentation has not been developed except by the Ministry of Tourism information centres.

The purpose of the study which this report documents is to examine the role of the tourist information centres in BC and to develop a plan for an integrated network of centres throughout BC.

The primary study objectives were:

(a) to assess tourist information centres; their location, design, operation, and objectives

(b) to determine methods of improving the benefit-cost of tourist information centres

(c) to prepare a manual regarding the location, design, and operational requirements of tourist information centres

(d) to make recommendations regarding the future development of tourist information centres throughout BC.

2.0 METHODOLOGY

This report presents our findings, conclusions, and recommendations regarding the assessment of the present system of tourist information centres, and offers a strategy for future network development.

Our work program included:

(a) Assessment of the Existing System

- Initial consultations with government personnel to obtain background information about the program and its objectives.

- Review of descriptive information about the program and related background documentation.

- Two focus group meetings with tourists who had just completed a visit to the Robson Square information centre.

- A field survey program which involved extensive data collection from 20 locations, including 4 BC centres and 16 local centres. (10 local satellite centres were also covered in association with these 20 centres.) The data collection program for each centre included:
  - physical inspection and photographs of the centre
  - a personal interview with a member (usually the senior member) of the information centre staff
  - a personal interview with a representative of the sponsoring organization
  - personal interviews of tourists at the centre. An average of 4 tourists per centre were interviewed.

In addition, in seven communities, we met with groups of business representatives involved in tourism-related operations to discuss the effectiveness of the centres.

The field program also included:

- interviews with the managers of the 9 Regional Tourist Associations (7 in person, 2 by telephone)
- brief visits to 26 additional centres -- 3 BC centres, 23 local and satellite centres. These visits involved a physical inspection, photographing the facilities, and a brief interview with the travel counsellor on duty.

. A visitor questionnaire which was administered at 32 local centres, 12 satellite (local) centres, 10 provincially operated centres in BC, and one provincially operated centre in Banff. In excess of 4,000 responses were analyzed by computer to identify response trends.

(b) Review of Market Trends and Other TIC Programs

. An interview with the manager of the BC Chamber of Commerce regarding directions of development for that organization.

. Interviews with provincial tourism representatives from 9 provinces and one representative from each of Travel Arctic, Tourism Canada, and Parks Canada regarding the operation of their tourist information centre networks.

. Interview with two representatives of foreign offices of BC tourism.

. A review of general market trends in the travel industry and visitor trends in the use of tourist information centres.

. A review of a study concerning tourist information centre systems in England and the Netherlands.

(c) Development of a Plan for the Future

- Benefit-cost evaluation of tourist information centres and a development of a set of guidelines for assessing their effectiveness.

- An preliminary examination of potential computer applications for use in tourist information centres.

- A meeting with Expo 86 representatives to discuss their potential need for tourist information centre services.

- The development of tourist information centre design concepts and spatial requirements.

- The development of funding and administration alternatives covering a new format for tourist information centres.

- The development of a practical guide to the operation of a tourist information centre (a separate document).

The development of an entry format for TICs, new building design concepts, and the spatial requirements were accomplished in association with

The Eikos Group (Landscape Architects and Planners); and
John Kerrigan Sproule and Associates (Architects).

Appendix E (Volume II) presents a list of personal contacts made during the study. The assistance of each of these individuals added significantly to the comprehensiveness of this report.

3.Ø EXISTING TOURIST INFORMATION CENTRE SYSTEMS IN BC

3.1 Description

3.1.1 Distribution and Location of Centres

The existing system of tourist information centres (TICs) in BC consists of 1Ø provincially operated centres, 133 independently operated local centres (including satellite locations), and one centre operated by a Regional Tourist Association. Table 3.1 lists by region TICs which were operating in the summer of 1983. The number of TICs located in each region reflects the size of the region and its share of the tourist market.

Table 3.2 shows the concentration of TICs by region in BC. It indicates that centres in regions B, C, and I should be the busiest.

The provincially operated centres are all located at major points of entry for tourist traffic (except the Victoria TIC which performs a major administrative role). In an effort to cater to tourists' needs as they enter BC, these centres concentrate their efforts on the distribution of promotional and informational material pertaining to BC, the nine tourist regions, the provincial parks, and local areas.

The local TICs cater to either destination or on-route tourist traffic. Their efforts are concentrated on the presentation of detailed information about local and regional tourist offerings.

The actual location of local TICs may be:

- in town
- at the outskirts of town (on the main tourist in-flow route)
- at the junction of two major tourist routes.

TABLE 3.1: TOURIST INFORMATION CENTRES

IN BRITISH COLUMBIA

Region	Location	Season
Provincial Centres		
A	Victoria, 1117 Wharf Street	Year-round
B	Abbotsford, Highway	Year-round
	Vancouver, International Airport	Year-round
	Vancouver, Robson Square	Year-round
	White Rock, Douglas Border Crossing	Year-round
C	Osoyoos, Jctn Highway 3 & 97	Seasonal
E	Valemont, Mt. Robson, Highway 93A	Seasonal
H	Dawson Creek	Seasonal
I	Golden, Highway 1	Seasonal
	Yahk, Jctn Highway 3 & 95	Seasonal
Local Centres		
A	Port Alberni, Highway 4	Year-round
	Alert Bay, Fir Street	Seasonal
	Campbell River, Highway 19	Year-round
	Chemainus, Highway 19	Seasonal
	Courtenay, Highway 19	Year-round
	Courtenay, Comox	Seasonal
	Lake Cowichan, Highway 18	Seasonal
	Cumberland	Year-round
	Duncan, Highway 19	Year-round
	Duncan	Seasonal
	Gold River	Seasonal
	Ladysmith	Seasonal
	Nanaimo, Centre	Year-round
	Nanaimo, Cassidy	Seasonal
	Parksville, Jctn Highway 4 & 19	Year-round
	Port Hardy	Year-round
	Port McNeill	Year-round
	Qualicum Bay	Seasonal
	Qualicum Beach	Seasonal
	Saltspring Island, Ganges	Year-round
	Sidney, Highway 17	Year-round
	Sidney, in town	Year-round
	Sidney, Brentwood Bay	Seasonal
	Sooke	Year-round
	Tofino	Year-round
	Ucluelet	Seasonal
	Victoria, 812 Wharf Street	Year-round
	Victoria, Langford	Seasonal

... continued

TABLE 3.1: TOURIST INFORMATION CENTRES continued

Region	Location	Season
Local Centres		
B	Abbotsford	Year-round
	Agassiz	Seasonal
	Burnaby	Year-round
	Chilliwack	Year-round
	Coquitlam, Port Coquitlam, Port Moody, Lougheed	Seasonal
	, Westwood Mall	Seasonal
	Cultus Lake	Year-round
	Delta, Jctn Highway 99 & 10	Seasonal
	Delta, Highway 17	Seasonal
	Delta, Tsawwassen	Seasonal
	Gibsons	Year-round
	Harrison Hot Springs	Seasonal
	Hope	Year-round
	Langley, Fraser Highway	Year-round
	Maple Ridge	Year-round
	Mission, Lougheed Highway 7	Year-round
	New Westminster	Year-round
	North Vancouver, East 2nd Street	Year-round
	North Vancouver, Capilano/Marine	Seasonal
	North Vancouver, Sea Bus Terminal	Seasonal
	Pemberton	Seasonal
	Powell River	Seasonal
	Richmond, No. 3 Road	Year-round
	Richmond, George Massey Tunnel	Year-round
	Richmond, Steveston Highway	Year-round
	Sechelt	Seasonal
	Squamish	
	Surrey, Guilford Shopping Centre	Year-round
	Surrey, L. Fraser Valley Ex. Assoc	Year-round
	Vancouver, Royal Centre	Year-round
	Whistler, Highway 99	Year-round
	White Rock	Year-round
	Yale	Seasonal
C	Armstrong	Seasonal
	Kelowna, South of CofC office	Year-round
	Kelowna, south of city	Seasonal
	Kelowna, north of city	Seasonal
	Kelowna, Orchard Park Mall	Seasonal
	Lumby	Seasonal
	Oliver	Seasonal
	Osoyoos	Year-round
	Penticton, Jubiliee Pavilion	Year-round
	Penticton, south of city	Seasonal
	Penticton, north of city	Seasonal

... continued

TABLE 3.1: TOURIST INFORMATION CENTRES continued

Region	Location	Season
Local Centres		
	Penticton, mall	Seasonal
	Vernon, 33rd Street	Year-round
	Vernon, south of city	Seasonal
	Vernon, north of city	Seasonal
D	Castlegar	Year-round
	Creston	Year-round
	Grand Forks	Seasonal
	Greenwood	Seasonal
	Kaslo	Seasonal
	Nakusp	Seasonal
	Nelson	Year-round
	Rossland	Seasonal
	Slocan Valley, New Denver	Seasonal
	Trail	Year-round
E	Ashcroft	Seasonal
	Chase, Highway 1	Seasonal
	Clearwater, Highway 5	Seasonal
	Enderby, Highway 97B	Seasonal
	Kamloops, 10th Avenue	Year-round
	Kamloops, west of city	Seasonal
	Kamloops, east of city	Seasonal
	Lytton	Seasonal
	McBride	Seasonal
	Merritt	Seasonal
	Revelstoke, Victoria Road	Year-round
	Revelstoke, Jnct Highway 1 & 23	Seasonal
	Salmon Arm, McLeod Avenue	Year-round
	Salmon Arm, north of city	Seasonal
	Salmon Arm, south of city	Seasonal
	Sicamous	Seasonal
F	Bella Coola	Year-round
	Clinton	Seasonal
	Likely	Seasonal
	Lillooet	Seasonal
	100 Mile House	Seasonal
	Quesnel	Seasonal
	Williams Lake	Seasonal
G	Burns Lake	Seasonal
	Fort St. James	Seasonal
	Houston	Seasonal
	New Hazelton	Seasonal
	Prince George, Victoria Street	Year-round

... continued

TABLE 3.1: TOURIST INFORMATION CENTRES continued

Region	Location	Season
Local Centres		
	Prince George, Jnct Highway 16 & 97	Seasonal
	Prince Rupert	Year-round
	Smithers	Seasonal
	Stewart	Seasonal
	Terrace	Year-round
H	Atlin	Seasonal
	Chetwynd	Year-round
	Dawson Creek	Year-round
	Fort Nelson	Seasonal
	Fort St. John	Year-round
	Hudson Hope	Seasonal
	Pouce Coupe	Seasonal
I	Cranbrook	Seasonal
	Fernie	Year-round
	Fort Steele*	Seasonal
	Golden	Seasonal
	Invermere	Seasonal
	Kimberley	Year-round
	Radium Hot Springs	Seasonal
	Sparwood	Seasonal
OUTSIDE BRITISH COLUMBIA		
Provincial Centres		
	Banff	
	Seattle	
	San Francisco	
	Los Angeles	
	London	

*Run by Regional Tourist Association; not truly a local centre.

Centres located in town are usually housed in the Chamber of Commerce building, and cater to both foot and rubber tire tourists. The central location is convenient for servicing the sponsoring organization's members and the tourists in a destination area. However, the shortage of adequate parking for oversized vehicles and the general congestion associated with in-town sites makes them less appropriate for the on-route traveller.

TABLE 3.2: CONCENTRATION OF TOURIST INFORMATION CENTRES BY REGION IN BC

Region		No. of Centres[1]	No. of Person-Trips[2] (1982)	Person-Trips Per Centre
Vancouver Island & Gulf Islands	(A)	29	2,310,000	79,700
Southwestern BC	(B)	37	3,460,000	93,500
Okanagan/Similkameen	(C)	16	1,470,000	91,900
Kootenay Boundary	(D)	10	550,000	55,000
Thompson Country	(E)	17	1,275,000	75,000
Cariboo	(F)	7	480,000	68,600
BC Yellowhead	(G)	10	745,000	74,500
Peace R/Alaska Hwy	(H)	8	290,000	36,300
BC Rocky Mountain	(I)	10	900,000	90,000
Total		**144**	**11,480,000**	**79,700**

1. Includes satellite centres.
2. Involves a minimum of one night stay.

Centres located at the outskirts of town or at highway junctions tend to be smaller facilities which cater to on-route travellers. These locations often allow better visibility, and have good signing and parking development possibilities. These locations provide an opportunity to influence tourists as they approach a decision point. Many of these locations are, however, accessible from only one direction. For some towns in BC, this has encouraged the use of multiple centres to service traffic from several directions.

3.1.2 Information and Promotional Material Provided by Centres

Some local TICs produce their own brochures or help coordinate the production of a local brochure for the municipality or for local operators. However, most centres simply provide a place to display and distribute local and non-local literature.

The local centres are very positive about displaying material concerning the nine tourist regions, the provincial parks, and BC in general. This material is well produced and is in demand from the travelling public. The centres are generally supportive of displaying material from other local areas as long as the material is of a non-commercial nature. Material that is of a commercial nature, such as hotel brochures, is not always displayed if it is perceived to be competitive with local businesses. In an effort to address all tourist information needs, some TICs display generic travel material from Alberta and Washington State.

The local centres tend to concentrate on displaying literature describing local attractions and services. Often a special rack is designated for local brochures or an activity board is provided for local notices.

When considering a brochure for display at a local centre, the stated policy in our sample tended to be either:

- no strictly enforced rules and no fees are charged for space; or
- if the operators (or party) in question are local, then they must be a member of the sponsoring organization; if they are not local, then they are asked to join the sponsoring organization, the local Regional Tourist Association or their Chamber of Commerce.

Where no rules are involved, any private operator can have a brochure displayed, but local operators are often given

preferential space on the racks. When rules are used, the underlying objective is to protect local sponsors' interests. In some TICs this means that:

- brochures from local organizations which are not contributing to the TIC are not displayed (or even carried);
- non-local private brochures are placed in racks which are not directly accessible (and sometimes not visible) to the public; and
- counsellors are discouraged from promoting non-local attractions or events.

The provincially-run centres use a Brochure Approval Committee, which consists of three people from the Ministry of Tourism. The Committee has developed a set of policies and guidelines relating to the acceptance of material for display. These policies and guidelines are supplied to tourist operators who are interested in having their materials displayed at BC centres.

As a general rule, the brochures that are acceptable are those that relate to routing, attractions, and events of community interest. Brochures relating to major destination resorts are acceptable, but brochures relating strictly to individual hotels, motels, restaurants, or other commercial establishments are not acceptable.

3.1.3 Role of the Ministry of Tourism

The Ministry of Tourism takes an active role in the tourist information centre system through its provincially operated centres (and through one centre located in Banff). Indirectly, the provincially-run centres set the standard of service for the rest of the province. An interesting finding from our field survey is that many tourists do not recognize the provincially run centres as being different from the locally run centres and expect to get the same quality (if not scale) of service from all the centres throughout BC.

The direct dealings between the Ministry of Tourism and the local centres include:

(a) supply of the BC Road Map, the Travellers Handbook, and the BC Accommodation Guide for distribution to tourists
(b) provision of operating grants
(c) provision of reference material, e.g., the Reference Manual with regular updates, the Resource Guide, and quizzes which encourage travel counsellors to maintain a familiarity with the reference material
(d) provision of staff training courses and instructors
(e) provision of assistance in dealing with other ministries, e.g., the Ministry of Labour for the summer student wage subsidy program and the Ministry of Highways for the location of highway approach signs.

The Ministry of Tourism also operates tourist information offices in Seattle, Los Angeles, San Francisco, and London. These offices are sales oriented with the travel industry as the primary target. Their purpose is to generate interest in BC holidays and to keep the industry up to date on developments and opportunities in BC. Promotional efforts in these offices include advertising in both trade and consumer media and participation in travel shows catering to both trade and consumer audiences. The Ministry has chosen locations for these offices which are less accessible to the general public in an effort to avoid a level of personal inquiries which the offices are not equipped to handle. The brochures displayed in the offices are limited to BC government publications. Each office carries, but does not display, the same level of information generally carried in the provincial centres in BC.

3.1.4 Role of the Regional Tourist Associations

The main objective of the Regional Tourist Associations is to promote tourism in the regions. Their activities include the production of Regional Travel Guides, local brochures, and specialized activity brochures (e.g., fishing camp guides).

The Associations have the following dealings with the tourist information centres:

(a) supply regional promotional brochures
(b) verify the information in the tourist information centre operating grant application
(c) coordinate the offering of the Travel Counsellor's Techniques course
(d) supply additional quantities of individual members' brochures on request.

Although not consistent among the Associations in BC, the following activities are also undertaken by some:

(a) conduct an annual meeting for all the managers of the information centres in the region
(b) prepare an information package to act as a supplementary reference document for the travel counsellors (e.g., with details on regional attractions or travel counselling techniques)
(c) organize familiarization tours for travel counsellors in the region
(d) counsel centre managers on the variety of funding programs available and application procedures
(e) provide a liaison between centres in the region and the Ministry of Tourism and between the local centres themselves
(f) encourage the upgrading of staff through training
(g) encourage the concept of promoting the region as a whole.

Two Associations are also directly involved in servicing tourists. The Yellowhead 16 Region Association has a fully qualified travel counsellor working in the Smithers office. Although this is not an official tourist information centre, it does service a significant number of personal inquiries. The BC Rocky Mountain Tourist Association actually runs a new tourist information centre at Fort Steele Provincial Park. This centre handles more than 200 inquiries per day during the summer.

3.1.5 Role of the Federal Government

Parks Canada operates tourist information centres in:

Yoho National Park (2)
Glacier National Park (1)
Kootenay National Park (2)
Pacific Rim National Park (1).

These centres are intended to provide information to tourists, but there is no emphasis on sales. The information provided generally concerns:

- location of points of interest
- location of camping areas
- what there is to see and do in the park
- hazards
- care of the park
- use of park facilities.

The literature available includes:

- detailed brochures on the local park
- brochures on other parks
- guides to the trails and how to hike in back country
- topographic maps
- BC road maps
- BC Accommodation Guide.

Except for the topographic maps, this material is provided free of charge.

While there are currently no locations sharing a facility with a BC tourist information organization, there are plans for two new centres (Banff and Kootenay National Park) which could involve a cooperative operation.

Tourism Canada operates two North American tourist information offices (Ottawa and New York). Tourist information is also available in consulate offices. Similar to the foreign offices operated by the Ministry of Tourism, the offices operated by Tourism Canada are located away from

the public traffic and are not oriented toward individual travellers.

The federal government is also involved in funding some of the TICs in BC. Travel counsellor wage assistance is available through Canada Employment and Immigration Commission's employment development program and labour subsidies for centre construction can be obtained from other federal programs depending on the circumstances involved.

3.1.6 Scope of Operations

The scope of operations for TICs varies substantially throughout BC. Table 3.3 indicates the staff levels and the number of mid-summer personal inquiries at each TIC contacted in our study. Table 3.4 shows the relative inquiry loads placed on staff at these centres. In general, the volume of personal inquiries per travel counsellor is higher at the provincially-run centres (BC centres).

The variation in the scope of operation is typified by:

- Victoria, GVVIC (local centre) -- 15 travel counsellors (TCs) in the summer service 1,200 to 1,500 personal inquiries per day

- Robson Square (BC centre) -- 14 TCs in the summer service 1,000 personal inquiries per day

- Penticton (local centre) -- 14 TCs in the summer service 800 personal inquiries per day

- Dawson Creek (BC centre) -- 3 TCs in the summer service 50 personal inquiries per day

- New Hazelton (local centre) -- 4 TCs in the summer service 30 to 50 personal inquiries per day

TABLE 3.3: CENTRE SIZE, VOLUME, AND STAFF LEVELS

Centre	Staff Levels: Summer Students	Staff Levels: Yr-rd	Staff Levels: Full Time Equiv	Inquiries/Day[5] (Summer, 1983): Personal	Inquiries/Day[5] (Summer, 1983): Phone	Total Personal Inquiries 1982
BC Centres						
Victoria	2	1.5[4]	2.2	75	50	11,780
Abbotsford	5.5	2.5	4.3	450	25	63,175
Vancouver Int Airport	1	4	4.3	330	35	94,998
Vancouver Robson Sq	9	5	8.0	1,000	700	103,554
Wht Rock/Doug's Cross	5	3	4.7	450	25	84,422
Osoyoos	3	-	1.0	110	5	9,998
Yahk	3	-	1.0	100	<5	10,505
Valemont	3	-	1.0	130	10	11,393
Dawson Creek	3	-	1.0	50	5	5,083
Golden	5	-	1.7	190	8	17,416
Local Centres						
Parksville	4	.5	1.8	70-100	10	9,480[3]
Campbell River	4	1.7	3.0	100-150	20-25	10,640[3]
Nanaimo - in town				80	25-30	
Nanaimo - Cassidy	5	2	3.7	40-50	-	11,580[3]
Sidney - Highway 17				80-150	<5	
Sidney - in town	3	2.5	3.5	50-100	-	35,000
Sidney - Brentwood Bay				30	-	
Victoria 812 Wharf St	12	3.5	7.5	1200-1500	50-80	288,000[3]
Gibsons	3[1]	1	2.0	30	6	3,700
Whistler	1	1.4	1.7	40-50	6	6,018
Penticton - Jub Pav				200-250	100-150	
Penticton - Highway 97S				175	-	
Penticton - Highway 97N	13	1.5	5.8	200-250	-	66,000
Penticton - Mall				150	-	
Vernon - 33 St	2	.5	4.2	50-100	11	
Vernon - Highway 97S	4	-		100-150	-	17,000
Vernon - Highway 97N	5	-		100-120	-	
Nelson	4[2]	.8	2.1	45-60	8	not availabe
Kamloops - 10 Ave				100-150	na	not
Kamloops - Highway 1W	8	1.5	4.1	60-100	-	available
Kamloops - Highway 1E				30-50	-	
Salmon Arm - McLeod Ave				15-25	na	5,000
Salmon Arm - North	7	.2	2.5	50	-	0
Salmon Arm - South				50-70	-	0
Williams Lake	3	-	1.0	50-70	25	5,200[3]
New Hazelton	4	-	1.3	30-50	-	3,000
Prince Rupert	6	2.4	4.4	100-150	10	22,000
Kimberley	2	1.5	2.2	75-100	12	7,000

1. Summer staff mainly work on Langdale Ferry.
2. 3 of summer staff on special project involving a reservation service.
3. Based on the total number of visitors and using a 2.5 conversion factor.
4. The year-round staff of 8 mainly work on administration activities associated with the operation of all provincially-run TICs.
5. Typical mid-summer volume.

NB: Staff levels are not actual head counts. Rather, they are based on an estimate of the person-days which are spent on tourist information centre activities. Summer staff levels are in addition to the year-round (or permanent) staff levels.

TABLE 3.4 INQUIRY LOADS

Centre	Total Staff in Summer	Mid-Summer Personal Inquiry Rate Per Day	Staff Load Indicator*
BC Centres			
Victoria	3.5	75	21
Abbotsford	8	450	56
Vancouver Int Airport	5	330	66
Vancouver Robson Sq	14	1,000	71
Wht Rock/Doug's Cross	8	450	56
Osoyoos	3	110	37
Yahk	3	100	33
Valemont	3	130	43
Dawson Creek	3	50	17
Golden	5	190	38
Local Centres			
Parksville	4.5	85	19
Campbell River	5.7	125	22
Nanaimo	7	125	18
Sidney	5.5	220	40
Victoria	15.5	1,350	87
Gibsons	1	30	30
Whistler	2.4	45	19
Penticton	14.5	775	53
Vernon	11.5	310	27
Nelson	1.8	50	28
Kamloops	9.5	245	26
Salmon Arm	7.2	130	18
Williams Lake	3	60	20
New Hazelton	4	40	10
Prince Rupert	8.4	125	15
Kimberley	3.5	85	24

* Does not correspond to inquiries per day per person because not all staff are on duty at the same time.

- Chemainus (local centre) -- 2 TCs in the summer service 10 to 15 personal inquiries per day.

In each of these cases, the number of TCs employed covers one week of activity and the actual number on duty at any one time (or during one specific day) will vary throughout the week. Due to shift scheduling, the number of TCs working each day will be less than the total TCs associated with the centre.

The variety of scope is also reflected in the structure, design, materials, size, and age of the buildings which house information centres. There are no design, layout, or size consistencies. Some local centres share space in an existing building; others have renovated a heritage building; and others have built a new structure with donated labour and materials. Several local centres in our sample valued their structure at a replacement cost of about $50,000. These were free standing structures using a cabin style of design, with sufficient size to handle 150 inquiries per day.

3.1.7 Operating Budgets and Funding Sources

Recognizing that tourist information centres are highly labour intensive, it is logical to assume that the annual operating budgets for these centres will vary in proportion to their staff levels. However, this is only partially true. While some centres operate on a shoe-string budget, which allows for few costs beyond those of the seasonal summer staff, others are involved in extensive promotional activities.

Table 3.5 illustrates the variation in operating budgets for local centres. In half the local centres in our sample, wages account for more than 80% of the operating budget; in the others the wage bill averages about 65% of the annual operating budget.

TABLE 3.5: OPERATING BUDGETS FOR SAMPLE OF INFORMATION CENTRES

	Annual** Operating Budget	Annual Wage Bill	% of Budget	Total Prov/Fed Subsidy	% of Budget
Local Centres*					
1	$ 18,500	$ 16,500	89.2	$ 14,500	78.4
2	64,200	42,600	66.4	9,000	14.0
3	53,863	48,500	90.0	19,950	37.0
4	14,010	12,760	91.1	8,000	57.1
5	8,764	7,008	80.0	8,364	95.4
6	30,950	7,000	22.6	3,500	11.3
7	21,200	19,800	93.4	21,200	100.0
8	39,165	32,500	83.0	27,700	70.7
9	38,000	26,000	68.4	14,400	37.9
10	137,670	85,744	62.3	16,605	12.1
11	11,100	7,565	68.2	5,900	53.2
12	76,100	45,961	60.0	28,072	36.9
13	20,000	16,150	80.8	9,750	48.8

* The names of the local centres in our sample are not given in order to ensure financial confidentiality.

** The annual operating budgets were generally derived by estimating the centre's share of a sponsoring organization's total budget or by removing activities which are not part of a basic TIC operation from a generalized budget.

Some of the key variables which will significantly affect the size of the operating budget are:

	Example
- the number of days of operation	90 days, 120 days, year-round
- the number of students or travel counsellors	2, 3, 10
- the number of permanent staff	none, 1, 4

- the location - single	separate, part of Chamber office
- multiple	2, 3, 4
- the degree of promotional activities	none, local brochures produced, organization of tours and convention activities, trade show participation

Clearly, the scope of the operation will depend on the tourist orientation of the sponsoring organization, the proximity to a destination area, the perceived importance of tourism to the area, and the availability of financial support.

A typical budget (expressed in 1983 dollars) for a local TIC with the following characteristics is shown below:

- 91 day, summer operation only
- open 7 days per week from 8AM to 8PM
- housed in a 600 square foot building; separate from the Chamber of Commerce office
- very limited promotional activities
- staffed by 3 students (1 supervisor/travel counsellor, 2 travel counsellors)
- all staff have attended the Travel Counsellor's Techniques course and the supervisor worked the previous season at the TIC as a travel counsellor
- the supervisor started 2 weeks before the other staff to set up the operation
- all staff work 40 hour weeks
- wage rates are supervisor $5.50/hour; staff $3.95/hour
- benefits are calculated at 10%
- there is no rent charged to the TIC for the use of the building and there are no debt servicing nor depreciation charges incurred.

Expenses			
Wages:	Supervisor	$ 3,300	
	Staff	4,108	
		$ 7,408	
	Benefits	742	
		$ 8,150	73%
Operating Expenses:			
	Stationary & office supplies	$ 500	
	Equipment rentals	150	
	Repair, maintenance, & supplies	400	
	Telephone	200	
	Utilities	200	
	Postage	200	
	Travel & transportation	50	
	Training & education	600	
	Accounting	100	
	Insurance	200	
	Uniforms	250	
	Miscellaneous	200	
		$ 3,050	27%
Total Expenses		**$ 11,200**	**100%**

These figures are based on the experience of several local TICs and do no reflect the results of an efficiency study or examination of one specific TIC.

In 1983 the minimum hourly wage for TIC staff was effectively $3.65 for travel counsellors who had not completed the Travel Counsellor's Techniques course and $3.95 for travel counsellors who had completed the course. The rate reflects the level of wage reimbursement available through the province of BC's Summer Youth Employment Program. The financial support for individual TICs and the local competition for labour will affect actual wage rates.

In 1983, many centres used the minimum standard wage rate, while others used supplemented rates for both staff and

supervisors. (It is common to see a $1.50 per hour rate differential between summer travel counsellors and supervisor/travel counsellors.) In our sample of 18 local centres providing wage information, 14 organizations used the $3.65 or $3.95 per hour wage rate for travel counsellors. The other 4 organizations used higher rates, but they were lower than the wage paid to travel counsellors working at provincially-run TICs.

Funding is a major concern for local TICs. Many centres operate on a very tight budget, which can be significantly affected by the financial position of the sponsoring organization or the municipal government. The uncertainty associated with the level of government funding available through wage reimbursement programs makes planning difficult. These and other factors has stimulated the use of a variety of funding sources in local TICs. Table 3.6 presents the major funding sources used by the reporting TICs in our sample.

TABLE 3.6: FUNDING SOURCES FOR LOCAL CENTRES

	Percentage of Total Funding Requirements*				
	C of C/ Assoc	Municipal Grant	Fed/Prov Reimburse	Min Tourism Operating Grant	Misc Sales or Events
1	11%	10%	74%	5%	--
2	42	44	14	-	--
3	26	37	34	3	--
4	36	7	50	7	--
5	3	--	95	2	--
6	19	13	11	-	57%
7	--	--	100	-	--
8	30	--	64	6	--
9	16	--	38	-	46
10	--	80	12	-	8
11	--	47	45	8	--
12	28	25	35	3	9
13	30	18	44	5	3

* The funding requirement is an estimate of the proportion of the total budget which pertains to tourist information centre activities.

The seasonally operated local TICs in our sample used government wage reimbursement programs to cover from 50% to 100% of their operating budget requirements. For year-round TICs, the wage reimbursement program generally represented between 10% and 25% of their annual operating budget. Other important sources of funding for several centres are:

- membership dues from the sponsoring organization, e.g., Chamber of Commerce or Business Association
- grant or contractual fee for service from the municipal government.

The Ministry of Tourism's operating subsidy of up to $1,000 represented less than 10% of the funding requirements in all the reporting centres.

3.1.8 Staff Selection

Hiring for the provincially-run centres is done in accordance with the regulations of the Public Service Commission. The main criteria used in selection are

- outgoing, friendly, and pleasant personality
- excellent knowledge of British Columbia (highways, accommodation, parks, hunting and fishing regulations, etc.).

Some centres have additional requirements. For example, the Robson Square and Vancouver Airport centres require fluency in a foreign language, and the Robson Square and Victoria centres require typing skills. While all capable applicants are considered, the travel counsellors are most often hired from the ranks of first and second year university and college students.

For local centres, the hiring of year-round staff and the hiring of summer travel counsellors are discussed separately. In general, the permanent staff requirements of a local centre are quite low, because most of the tourist volume arrives in the summer months. Only a few centres need

full-time staff whose sole activity is travel counselling. Normally, year-round staff members have additional responsibilities, ranging from bookkeeping and typing to sales and promotion. Year-round staff members are also responsible for supervising the travel counsellors in the summer. The centres contacted in our sample considered the following characteristics to be important for year-round staff:

- the ability to handle and motivate people, especially subordinates
- an organized approach (valuable in scheduling summer staff)
- well developed communication skills
- detailed knowledge of the community and the region
- experience and training in the hospitality field
- a sales or marketing orientation.

The first two characteristics were mentioned the most frequently.

The procedure for hiring summer staff at the local centres is not as formal as that used by the provincial government. The following traits were viewed as being particularly important by the centres contacted:

- extensive knowledge of the local area
- outgoing, friendly personality
- strong communication skills
- neat appearance
- compatible, teamwork orientation toward coworkers.

The first two of these were mentioned most frequently.

In addition to college and university students, many local TICs provide jobs for graduating high school students. However, these students are often not available until the end of June which makes training difficult to schedule. Some local TICs have found senior citizens to be excellent travel counsellors. Their maturity, local knowledge, and desire to contribute have proved to be strong assets.

3.1.9 Training and Experience of Staff

The basic training program for most travel counsellors is the Ministry of Tourism's Travel Counsellor's Techniques course. It is a five-day course offered in conjunction with the Ministry of Education through local community college outlets throughout BC. The college provides the classroom facility and the Ministry of Tourism supplies the instructors and course material. The course costs $20 to attend and is offered during May and June. Although the course is specifically designed for travel counsellors, it is open to the public. There have been occasions when a TIC administrator has delayed staff hiring decisions and subsequently found the course to be filled.

In 1983 there were 16 courses held between May 1 and June 30. Of the 261 attendees, 113 had their wages paid by the Province of BC's Summer Youth Employment Program. The delivery of courses was as follows:

Region	No. of Times Offered
A	5
B	3
C	1
D	1
E	1
F	1
G	2
H	1
I	1

Under the existing format, the course is divided as follows:

- 40% of the time is spent in a workshop, practising the role of a travel counsellor under a variety of circumstances
- 60% of the time is spent learning the skills necessary to effectively perform the job of a travel counsellor.

Students are graded on the results of a two-hour written exam and on their workshop performance.

The program is designed around the tasks most frequently undertaken by travel counsellors and includes a 10-step procedure for handling complaints. Sales aspects of the role are presented in the course, but overt selling techniques are avoided.

The promotion approach taught in the course involves:

- identifying the visitor's needs
- providing alternatives
- letting the visitor make the choice
- making it easy for the visitor to stay in BC.

Provincially-run centres require that applicants for staff positions pass the Travel Counsellor's Techniques course. This ensures a solid training base for new counsellors. The amount of on-the-job training varies from manager to manager. The longest training period mentioned was 2-3 weeks, during which a new counsellor would work with at least one experienced counsellor. After 1,827 hours of work at a provincial centre, travel counsellors can take an upgrade exam. Successful completion of this test is rewarded with an 8% pay increase.

Staff at the local centres are generally not as well qualified as those at provincially-run centres. However, most local centres contacted had several trained staff to orient the untrained counsellors. The variation in the level of formal training is illustrated by the following statistics:

- In 9 of 16 local centres in our sample, all the travel counsellors (i.e., both summer and permanent staff) had completed the Travel Counsellor's Techniques course.

- In 3 of 16 centres, none of the summer staff had taken the Travel Counsellor's Techniques course.

Of the 91 summer staff employed in our sample of centres, 63%

had completed the Travel Counsellor's Techniques course; 61% had no previous work experience at a centre. The general lack of previous travel counsellor experience is due to the fact that most of the staff stay for only one season. In general, the on-the-job training varies from a few days to a week, and the level of sophistication varies from working with an experienced counsellor (from the previous year) to going through a formal orientation program culminating in a written examination. To enhance the counsellors' knowledge of the local area and the region, about half the centres in our sample set up formal familiarization trips as an early season training exercise or as an ongoing activity throughout the summer.

3.2 Effectiveness of the Current Program

3.2.1 Objectives

The tourist information centre program has the following primary objectives:

1. To enhance the quality of the visitors' experience. This is expected to result in repeat visitations and positive word of mouth advertising.

2. To increase the amount of money spent in BC by visitors. This is expected to be accomplished by:
   - encouraging an increase in the duration of a visitor's stay (e.g., by providing a reason for the tourist to travel further)
   - encouraging tourists to spend more money (e.g., by making them aware of additional attractions or events which can be fitted into their BC holiday).

Other objectives which have had some emphasis include:

3. To enable tourism to be carried out without environmental degradation.

4. To enable tourism to be carried out without an unnecessary level of inquiries directed to other citizens.

5. To encourage tourists to make return trips to BC, particularly during off-season months (e.g., by "seeding" them with ideas for future trips).

3.2.2 Approach

The effectiveness of the tourist information centre program can be judged by the extent to which the program is meeting its objectives. Our primary emphasis was on Objectives 1 and 2.

Data have been collected on a large number of indicators which were selected for each objective. Data collection activities included:

(a) A visitor questionnaire was administered at 32 local centres and 12 satellite centres, all 10 BC centres in the province, and one BC centre outside the province (Banff). This resulted in 4,393 usable visitor responses.

(b) A series of 83 visitor interviews were conducted at 21 centres (including 4 BC centres).

(c) A series of 52 interviews with representatives of information centre staffs, sponsoring organizations, Regional Tourist Associations, and local business groups were conducted.

The objectives of the data collection were as follows:

(a) to provide a database which
   - covered all tourist regions of the province
   - included a large enough volume of tourists to allow

the identification of subsector trends

(b) to provide data from several sources covering such subjects as:
- the type of information visitors want
- the degree to which visitors' information needs are satisfied
- the success of travel counsellors' selling efforts in terms of whether they induce visitors to add attractions to their agenda or lengthen their stay
- the importance of having centres available to visitors
- perceptions of the adequacy of the facilities

(c) to identify differences between local and BC operated centres and to identify regional differences.

The methodology used to administer the visitor questionnaire and select the sample is described in Appendix A (Volume 2).

Due to the data collection methods, there are potential biases in the data which must be kept in mind when interpreting the results of the research. For the interviews, these include:

(1) Most of the visitors interviewed were those who spent more than one minute talking to a counsellor. This allowed the visitor time to absorb enough information from the centre to make an interview worthwhile. (We also found that visitors who had a very quick question, or just came in for some material, were often in a hurry and were less willing to be interviewed.) Because the visitors we interviewed requested and received more service than the average visitor, their responses to quality of service questions may be more positive than the responses of the average visitor would be.

(2) The sample only included visitors who used an

information centre; those who did not use the centres were not interviewed.

(3) The sample of communities chosen for interviews with business operators is composed almost entirely (with the exception of Golden) of large scale centre operations. These centres tend to use more trained staff, should be capable of providing a better level of service, and tend to have a higher profile in the community.

(4) A large proportion (85%) of the sample of centres selected for detailed interviews at the visitor, staff, and sponsor levels have an inquiry volume in excess of 50 per day. The actual proportion of centres operating at lower levels far exceeds 15%. The detailed interview sample, therefore, may tend to understate the frequency of problems occurring at lower volume, less sophisticated centres.

The following comments describe the potential biases in the visitor questionnaire data.

(1) A high level of control was not possible in the administration of the questionnaires. It is not likely that questionnaires were completed by all or even most of the visitors to each centre during the data collection period. Those visitors completing questionnaires were likely those who:

- were assisted by a travel counsellor
- were not in a hurry
- were pleasantly disposed toward the travel counsellor.

The responses may, therefore, be more positive than they would be from the average centre visitor. They may also overstate the proportion of visitors who are encouraged to add attractions to their itinerary or extend their stay in BC.

(2) The sample only includes visitors who actually used an information centre; those who did not use centres are not included.

(3) The sample under-represents low volume centres, and the results may tend to understate the frequency of problems occurring at low volume centres.

(4) When comparing results across regions or when comparing results for one region with those for the entire sample, the following data-related limitations should be kept in mind:

- Region A is slightly overloaded by responses from the Victoria-GVVIC centre, which represent 20% of the Region A subsample.

- Region B is overloaded significantly by responses from the provincial centres at Douglas and Abbotsford which represent 37% and 30% respectively of the Region B subsample.

- Region C is slightly overloaded by responses from the main Penticton centre, which represent 20% of the Region C subsample.

- Region F is represented by only 29 responses.

- Region G is overloaded significantly by responses from the centres at Prince Rupert and Terrace, which each represent 40% of the Region G subsample.

- Region H is represented by only one centre.

- Region I is significantly overloaded by responses from the provincial centre at Golden, which represent 40% of the Region I subsample.

Responses relating to individual centre characteristics may not be representative of the entire region when serious overloading occurs. However, the responses which relate to visitor reactions will be representative for the region if large volume centres are the ones weighted. Therefore, rigorous regional comparisons are not appropriate in all situations.

3.2.3 Evaluation of Objective 1 (refer to section 3.2.1)

The somewhat nebulous concept of "enhancing the quality of the visitor's experience" can also be thought of as "increasing the enjoyment of a visitor's holiday." Although the ultimate degree of enjoyment depends on many factors, the experience a visitor has at a TIC can be a significant factor. For example, the travel counsellor can:

- answer questions and dispense helpful information
- help organize a traveller's activities
- reduce the level of frustration related to missing (bypassing) desirable sights or attractions
- help orient a visitor who is unfamiliar with the area
- provide friendly and enthusiastic communication which projects a "you are special" image.

The results of our research concerning indicators which measure the achievement of Objective 1 are shown in Table 3.7. Table 3.8 shows how some industry representatives view the TIC's achivement of Objective 1. The detailed results of the questionnaire survey are tabulated in Appendix A (Volume II).

Based on our analysis, the following findings indicate that the TICs in our sample are clearly meeting Objective 1.

. Satisfying Visitors' Information Needs. The TICs are providing the type of information desired by 96% of the visitors. Despite the generally higher level of training for staff at provincially-run TICs, no

TABLE 3.7: ACHIEVEMENT OF OBJECTIVE 1

	Indicator	Results	Source: Visitor Interviews	Source: Visitor Questionnaire
1.	% of parties getting information they need	Yes	96%	96%
		Yes or partly	99%	100%

Virtually all visitors to the TICs get the information they need. There are no significant differences on a regional basis and also no differences when responses from BC centres are compared to those from local centres.

2.	% of parties satisfied with centre's services and facilities	Completely happy	64%	NC
		Add: Reserve sys	0%	NC
		Public washrm	16%	NC
		Public phone	4%	NC
		Other	20%	NC

The majority of visitors are happy with the facilities. Although the question posed in the questionnaire was more complex and therefore not comparable, 65% of provincial centre respondents and 53% of local respondents indicated that no changes should be made to the centres. Furthermore, those who indicated changes should be made were not necessarily dissatisfied. The suggestion of adding public washrooms and telephones may indicate areas for consideration in individual centres. Although a reservation system is clearly not expected at centres, this does not indicate whether it would be used if it were provided.

3.	% of parties for whom information centres are important	Very important	68%	79%
		Nice to have	31%	20%
		Not important	1%	1%

TICs are clearly a positive factor for visitors. Detailed analysis of the questionnaire responses indicated that: visitors to BC TICs rated centres as "very important" more often than visitors to local centres did; foreign visitors rated all centres as "very important" more often than BC residents did. These results are:

Origin of Visitor	BC Centre	Local Centre
BC	81%	71%
Other Province	82%	78%
Other Country	88%	81%

4.	Impression of staff	Dressed: well	78%	93%
		OK	22%	7%
		Friendly	100%	98%
		Knowledgeable	98%	96%

The questionnaire results tend to upgrade the attire rating from the interviews: 98% of the questionnaire responses rated BC TIC staff as well-dressed compared to 91% for local centre staff.

... continued

TABLE 3.7: ACHIEVEMENT OF OBJECTIVE 1 continued

			Source	
	Indicator	**Results**	**Visitor Interviews**	**Visitor Questionnaire**
4.	Impressions of physical facilities	No change	65%	NC
		Better signs	24%	18%
		Better parking	10%	8%
		Improve exterior	1%	5%
		Improve interior	3%	1%
		Other	9%	NC

There are no significant differences between the questionnaire and interview results. However, the questionnaire data shows a significant difference between the rating of BC and local TICs. 10% of respondents at BC centres felt that better road signs were required, compared to 22% at local centres. The suggestions for improvements probably relate to individual centres, although the problem of signing is more generally applicable. Despite the wide variety of interiors and exteriors at TICs in BC, improving their appearance was not a matter for attention in the opinion of the visitors sampled.

5.	% of parties saying that a lack of centres would negatively affect enjoyment of their holiday	Serious neg effects	14%	NC
		Minor neg effects	78%	NC
		No effect	4%	NC

The high "minor negative effects" response was expected. The TIC is not the focus of the holiday -- the major enjoyment comes from the other experiences in BC. The existence of a negative response at all reinforces the importance of TICs.

NC = not comparable results.

TABLE 3.8: INDUSTRY OPIONIONS ON OBJECTIVE 1

1.	Sponsor's opinion on centre's success in meeting Objective 1	Successful	(17/17)	100%

Although the sponsoring organizations felt that the centres were meeting Objective 1, two felt that better trained staff could improve performance.

2.	Tourism-related operators' opinions on centres' success at meeting Objective 1	Beneficial	(7/7)	100%
		Meeting Obj 1	(7/7)	100%

As might be expected due to bias #3 for the interview data, in all communities visited, the concensus of business representatives was that the local centre was beneficial to their operation and was meeting Objective 1.

3.	RTA managers' opinions on centres' success at meeting Objective 1	Successful	(8/9)	89%

Almost all region managers believe that Objective 1 is being met or that progress is being made toward meeting it. One RTA manager believes, however, that the actions of the TIC staff have little effect on enhancing the visitor's experience. He believes that the attitude of the tourist-related business operator has a far more lasting effect and, in fact, is the determining factor in creating a positive or negative impression.

significant difference in the level of visitor satisfaction was found when the responses from local and provincial centres were compared.

- Staff Impressions. Despite variations in dress codes, the staff from the sampled centres were viewed as well dressed by 93% of the respondents. The staff were also considered to be friendly and knowledgeable by 98% of the visitors.

- Importance of TICs to Tourists. TICs are clearly important to the visitors who use them. (79% of the questionnaire respondents considered them to be very important.)

- RTAs Opinions. Although some TICs are providing better service than others, the concensus of the RTA managers is that the TICs are meeting or making satisfactory progress toward meeting Objective 1.

3.2.4 Evaluation of Objective 2 (refer to section 3.2.1)

Data have been collected from visitors and industry representatives to assess the TICs ability to increase the amount of money spent by visitors. The results are presented in Table 3.9. Both the interview and questionnaire results indicate that the TICs are having a positive effect on tourists' spending patterns in BC. It is expected, however, that the "built in" biases may cause an overstatement of the size of the gain which TICs are actually stimulating.

The TICs are addressing Objective 2 in the following ways:

- Influencing Visitors to Extend their Stay. The questionnaire responses indicate that 34% of the non-BC resident respondents were encouraged to add at least one extra day in BC to their travel schedule. Of these visitors, one-half tended to stay two or more extra

TABLE 3.9: ACHIEVEMENT OF OBJECTIVE 2

Indicator	Results	Source: Visitor Interviews	Source: Visitor Questionnaire
1. % of tourists extending stay or adding items to itinerary	Added items	59%[a]	71%[a]
	Extended stay	18%	34% non-BC res 25% BC res [b]
	No change in plans	35%	NC
	For those who changed plans:		
	Net gain to BC	74%	NC
	Net gain to local area, but not BC	20%	NC
	Can't judge who benefitted	6%	NC

[a] These figures are not additive because of multiple answers.
[b] This figure represents extended stays in the local area (7 hours or more), but not necessarily a net gain to BC.

Due to bias #1 in both the interview and questionnaire data, the results probably overstate the percentage of visitors who extend their stay or add items to their itinerary. Both data sources indicate that the visit to the centre can result in an extended stay in BC and can provide a net gain by making tourists aware of activities or attractions which they add to their itinerary. The questionnaire data indicate no difference in the "success rate" of BC centres compared to that of local centres in extending stays. However, BC centres appear to have a better success rate for adding attractions. This may be due to the large proportion of foreign visitors using BC centres. The data for adding attractions are as follows:

Visitor Origin	% of Respondents Adding Items: BC Centres	Local Centres
BC	72%	67%
Other Provinces	72%	65%
Other Countries	81%	74%

Even if the percentages are overstated, it appears that a higher percentage of foreig visitors can be encouraged to add attractions compared to what may be achieved when dealing with either BC or other Canadian residents.

2. % of centre managers who believe that travel counsellors point out previously unfamiliar attractions/events to visitors	Believe staff sold a lot	(9/20)	45%
	Believe staff don't sell at all	(2/20)	10%
	Don't know	(9/20)	45%

Personal observation indicates that managers tended to overstate the frequency of selling efforts. The fact that 9 managers could not estimate the percentage of

... continued

TABLE 3.9: ACHIEVEMENT OF OBJECTIVE 2 continued

Indicator	Results	Source: Visitor Interviews	Source: Visitor Questionnaire

inquiries on which travel counsellors try to sell indicates that estimates likely have a large error range. However, the results show that some centres encourage selling activity and use a consistent, tourist sensitive selling approach (not an overt hardsell approach). Opportunities for selling vary across centres: large fluctuations in visitor volumes reduce selling opportunities during peak times; and selling efforts are affected by the degree of apparent visitor haste. E.g., if a visitor appears in a hurry and only wants a map, directions, or a specific question answered, then selling opportunities are limited. There is a potential conflict between emphasizing selling efforts and a need for fast, efficient customer service.

4. Opinions of sponsors regarding whether the TIC meets Objective 2	Meeting	(10/16)	63%
	Room for improvement	(2/16)	12%
	Can't judge	(4/16)	25%

The majority of the sponsoring representatives believe that the centres are achieving Objective 2 satisfactorily. Those who could not judge had a positive opinion, but were reluctant to comment on the effect the selling efforts likely had on tourists' plans or activities.

5. Opinions of business operators regarding whether local TIC is meeting Objective 2	Centre activity beneficial to business	(7/7)	100%
	Meeting	(3/7)	43%
	Room for improvement	(4/7)	57%

The business groups had a positive attitude toward the local centres and felt they were beneficial to tourist-related businesses. However, half the groups felt that the centres were not particularly successful in achieving Objective 2. Suggestions for improvement included:

- more emphasis on sales efforts & opportunities, especially for local attractions
- local businesses should make more promotional information available to centres.

6. Opinions of RTA managers regarding whether TICs in the region are meeting Objective 2	Meeting	(3/9)	33%
	Partially	(5/9)	56%
	Not meeting	(1/9)	11%

It is significant that 6 managers feel that improvement is needed. While travel counsellors are not trained as salespeople, it is generally felt that not enough emphasis is placed on the importance of selling. This is often accompanied by a less than adequate knowledge of the region's features. Promotion problems tend to lie with the smaller budget centres rather than with the larger operations.

days. The interviews indicated that 18% expected to extend their stay as a direct result of their trip to the TIC. It is likely, however, that even the 18% figure overstates the actual success rate due to the data's built-in basis #1.

Responses from BC residents indicate that 25% were encouraged to extent their stay more than 6 hours. However, there is no indication of whether the duration of the holiday period in BC was actually affected. Some of these extensions may have represented regional transfers.

Data obtained during the interview process suggested that most visitors to TICs do not have flexible time schedules. It is, therefore, unrealistic to expect centre staff to have a high success rate in extending the length of a visitor's stay.

. Adding Items to Itinerary. The questionnaire responses indicate that 71% of the visitors would likely see or do more than they had planned as a direct result of the TIC. The interviews indicated that 59% would add items which were unplanned. In addition to bias #1, there may have been a tendency for respondents to answer affirmatively when a new activity was substituted for a less desirable one.

The results of the visitor interviews indicate that 48% (74% x 65%) of the tourist parties stopping at TICs were influenced in a manner leading to additional tourism expenditures in BC. However, based on personal observation, the sample bias and the lack of responses from all tourists parties, it appears reasonable that the 48% figure should be conservatively reduced to the 30% level.

Despite the biases, the data clearly indicate success in

this activity. Making tourists aware of attractions, promoting their appeal, and helping tourists fit them into their travel schedules is the main area for potential gain through TIC efforts. Our research indicates that TICs are slightly more effective in encouraging foreign visitors to add attractions.

Based on personal observation and on the opinions of representatives from the sponsoring organizations, tourist-oriented businesses, and Regional Tourist Association managers we conclude that although Objective 2 is being addressed, the TICs could improve their effectiveness in this area.

3.2.5 Consideration of Other Objectives (refer to section 3.2.1)

It has been suggested that an objective for the centres is to assist in the avoidance of environmental degradation by supplying information on hunting, fishing, camping, and other natural resource related regulations. Our research indicates that less than 10% of the visitors are looking for such information at the centres. The questionnaire data indicate that 15% of the visitors are in this category. Due to the large size of the questionnaire sample, the latter figure is expected to be a better indication of the demand for such information.

Although there are no differences in responses from BC or local centres, regional responses ranged from 19% to 25% of visitors looking for regulatory information. This suggests that the provision of such information is not generally expected by the bulk of BC's tourists, but that it may be an important offering at centres catering to wilderness oriented tourists.

It has also been suggested that the TICs have a role to play in reducing the number of tourist inquiries directed to roadside businesses. Our research indicates that if there

were no centres, 42% of the visitors interviewed would have stopped at a roadside business to obtain the desired information. Our interview results show that only 15% of the respondents were unable to find a TIC when they wanted one. It appears, therefore, that centres are relieving roadside businesses from considerable pressure.

We were unable to measure the success rate of travel counsellors in encouraging return visits. It was clear, however, that their efforts could seed visitors with the idea of returning. On several occasions tourists indicated that their current time schedules were limited, but they intended to come back to see other features mentioned by the travel counsellor. If the counsellor is enthusiastic, knowledgeable, and has a long list of features which may interest visitors, there is a reasonable chance that they will think of BC when considering their next holiday. (It should be noted that there is some overlap between this objective and objective #1.) However, it was not common to see displays or hear counsellors promoting off-season activities. Based on our observations, there is room for improvement in addressing the off-season aspect of this objective.

3.2.6 Local Objectives for Tourist Information Centres

The local sponsoring organizations have set a variety of objectives for their centres. Representatives from the sponsoring organizations felt that, with two exceptions, the centres were achieving the desired level of success. The stated local objectives included:

- to provide an accurate, helpful information service to tourists
- to encourage tourists to visit (or stay longer) in their community
- to encourage the development of the tourism industry in their community

- to encourage local businesses to become enthusiastic about tourism and to educate the local community about the values of tourism
- to encourage travel to their community
- to make tourists aware of local and area attractions
- to encourage tourists to spend money in the community
- to encourage tourists to make return visits to the community
- to greet tourists
- to encourage private operators to provide tourists with a high level of service
- to provide a service for tourism-oriented businesses in the community.

The first two objectives were mentioned by 70% of the sponsoring groups interviewed. Note that many of these local objectives overlap with the two primary objectives stated in section 3.2.1, although they are stated from the local perspective -- i.e., "stay longer in the local area" rather than "stay longer in BC."

The objectives mentioned by the business community representatives contacted form a subset of those mentioned by the sponsoring organizations and tend to reflect Objectives 1 and 2. The key ones can be summarized as follows:

- to provide general information as requested by tourists and to provide details on all the attractions and services available in the community
- to promote local attractions and events primarily; but also to promote regional attractions and events
- to satisfy visitors' needs (interests) with the objective of encouraging a longer stay within the region as a whole
- to conduct promotional efforts to attract visitors to the community
- to educate the business community about the value of tourism.

In general, the business community representatives felt their local centres were achieving these objectives.

According to the Regional Tourist Association managers, the key objectives, in addition to Objectives 1 and 2, for the TICs to address are:

- to provide a high quality information service to tourists
- to promote a regional approach rather than a community approach to tourism.

In general, the managers felt that these objectives are not presently being achieved at a satisfactory level.

It should be mentioned that all three of these groups found the question about their objectives for the centres difficult to answer. Most of these people are not used to thinking in terms of objectives. Also, many of them think of information centres as an integral and necessary part of the tourism infrastructure, like roads. Therefore, it is much easier for them to think of appropriate functions for the centres rather than objectives.

4.Ø MARKET TRENDS

4.1 General Characteristics of Tourist Information Centre Users

4.1.1 Low Dispersion

Based on our analysis of the Visitors '79 database (presented in Appendix B - Volume II), the average tourist spends time in only 1.6 regions in BC. The data show that:

- 65% of tourists visit only 1 tourist region
- 20% of tourists visit only 2 tourist regions
- 15% of tourists visit 3 or more tourist regions.

These figures emphasize the importance of provincial centres maintaining a high profile in areas near border crossings. Not only do these centres have the potential to catch the bulk of the traffic as they enter BC, but they also have an opportunity to encourage dispersion and longer trips by making visitors aware of the many tourism features located throughout BC.

4.1.2 Proportion of Visitors Who Use Tourist Information Centres

Based on the Visitors '79 data analysis, 22% of the non-resident tourists (those who stayed at least one night in BC) visited at least one TIC. Due to the low dispersion of tourists, this figure could be used to roughly estimate the minimum number of centre inquiries expected in each region as a result of non-resident tourists. For BC as a whole, the 1982 minimum is estimated as follows.

Visitor Origin	Person-Trips
Non-Resident Canadian	2,930,000
United States	2,560,000
Overseas	440,000
Total Person-Trips	**5,930,000**

No. Parties (@ 2.5 tourists/party)	2,372,000
Minimum No. Inquiries From Non-Residents (22% of parties)	522,000

Source: "Tourism Highlights 1982", Ministry of Tourism.

Multiple stops at TICs and the inclusion of inquiries from BC resident tourists will significantly increase the estimated number of inquiries. The multiple inquiry aspect is particularly a factor in destination areas.

4.1.3 Residence

Residence or origin of tourists is a factor when considering the appeal of TICs. The more familiar tourists are with an area, the less likely they are to use a TIC. Visitors '79 data indicate that the percentage of Albertan visitors who use TICs is significantly lower than that for visitors from the rest of Canada, USA, or overseas.

Visitor Origin	% of Visitors Who Use TICs
Alberta	19%
Other Canada	29%
Washington	28%
California	36%
Other USA	38%
Overseas	40%

This differing level of interest in TICs is supported by the results of our visitor questionnaire research. If TICs appealed to all groups equally, the composition of our visitor sample could be expected to approximate the 1982 visitor mix as presented in "Tourism Highlights 1982." The following figures suggest that BC residents use TICs significantly less than other tourists.

Visitor Origin	1982 Person-Trips	Visitor Questionnaire Results: Total Sample*	Prov TICs	Local TICs
BC	48%	31%	17%	38%
Other Canada	26%	32%	21%	34%
Other Country	26%	37%	62%	28%
	100%	100%	100%	100%

* excludes Banff responses.

Note: BC Residents tend not to use provincial TICs (because of border locations). Therefore, the local TIC figures may be the most representative percentages to use for comparison to the visitor mix data.

4.1.4 Pre-Holiday Planning Needs

Non-North American residents usually get travel information from the Canadian Embassy (e.g., maps, brochures, and books). For those without experience or contacts in BC, it is important to know what there is to see and do and where the population centres are located. Participants in our focus group sessions mentioned that information on major attractions and activities, seasonal climate fluctuations, a list of points of interest in an area, and details on operating schedules and prices would be helpful for pre-trip planning. (Our focus group research is described in Appendix A - Volume II.)

Some participants who wrote to BC for tourist information were not satisifed with the response. Several people mentioned that they expected and needed more than simply a BC road map and a BC Accommodation Guide. Others commented that a general letter of inquiry produced no information other than a request form for more specific questions. However, two interviewees mentioned that the responses to specific questions produced everything they required and more. The mixture of reactions suggests a possible need to review the general information package mailed out in response to written inquiries.

Visitors tend to finalize the details of their trip after

they have arrived in BC. At this time very specific information on events and points of interest is important. The focus group participants mentioned the following information as examples of the level of detail desired:

- hours of operation for Lower Mainland and Victoria attractions, e.g., UBC Museum of Anthropology
- Lower Mainland bus system information (e.g., fares and schedules)
- hotel and restaurant guide with a rating system (particularly for accommodation)
- hunting and fishing regulations
- agricultural attractions (e.g., fruit seasons)
- off-season activities
- information on campgrounds, provincial parks, and national parks in BC.

4.1.5 Information Desired

A 1974 study of visitor trends at TICs in the USA indicated that while the desire for travel information is a major reason for stopping at a TIC, 30% of the visitors stop to use restrooms and 20% stop simply to rest. These figures emphasize the importance of other TIC offerings and the need to offer appropriate facilities.

Based on our visitor questionnaire research, the information most commonly sought is:

Information	% of Total Sample	Range by Region High	Range by Region Low
Places to visit	50%	Region A 62%	Region E 38%
Directions	45%	Region B 58%	Region C 34%
Accommodation	43%	Region C 54%	Region G 23%

The remaining information categories (restaurants, special events, and regulations pertaining to fishing, hunting, and camping) were each sought by approximately 15% of the respondents. Visitors to the provincially-run TICs more

frequently sought information on "places to visit" (60%) and "directions" (56%) than did visitors to the local centres (45% and 40%, respectively).

4.1.6 Fees for Information

Our research shows that the BC Accommodation Guide and BC Road Maps are well received, but that only 65% of the visitors interviewed would pay for these if a charge were attached. (A range of 50 cents to $1 was mentioned as acceptable.) In the opinion of the staff at the centres visited, visitors will pay for high quality materials, e.g., glossy souvenir brochure or posters, topographical maps, and specialized publications on activities like fishing or hiking. However, they did not think that visitors would pay a standard fee for inquiries or for private brochures.

Participants in our focus groups indicated more negative views about fees. Despite the recognized quality of the BC Road Map and the Accommodation Guide, similar materials are free in other provinces and participants felt that fees should not be charged for such general information.

4.1.7 Facilities Desired

Our research indicates that public telephones and washrooms are desirable features which some TICs do not offer. Two other facilities which visitors would use are a refreshment facility (e.g., drinking fountain, coffee) and a rest area (e.g., bench or picnic table outside, chairs inside).

Visitors like to look at large scale wall maps, particularly those showing local street patterns and colour coded local points of interest. The use of video equipment to display area attractions is a feature which was mentioned as desirable by participants in the focus groups.

Our research indicates that most people are uncomfortable

dealing with computer terminals. The visitors interviewed felt that a terminal would have to be very simple and very user friendly. Personal contact with the travel counsellors is viewed as an important element in maintaining a friendly atmosphere. According to participants in the focus groups, self-serve computer terminals would only serve as a supplementary information source.

4.1.8 Party Size and Transportation

Based on our analysis of the Visitors '79 database, the size of parties who visited TICs was slightly larger than those who did not. The results are shown below and indicate that 2.9 may be a better conversion factor (of people to inquiries) for users of tourist information centres than the 2.5 currently being used.

Another area of difference (closely related to differences in party size) involves party composition. A larger percentage of parties who visited TICs travelled with children (29.3% vs 20.5%) and a smaller proportion were single adults (9.3% vs 24.0%).

		Those Who Visited Centres	Those Who Didn't Visit Centres
Party size		2.91(±.16)*	2.45(±.07)*
Party Composition:	1 or 2 children	22.2%	16.6%
	3 children	7.1	3.9
	single adult	9.3	24.0
	2 adults	50.8	44.9
	3 adults	4.2	4.8
	4 adults	5.2	4.6
	5 adults	1.0	0.5
	more than 5 adults	0.2	0.7
		100.0%	100.0%

* The error term describes the range available within 95% confidence limits.

The Visitors '79 data show a trend for TIC visitors (compared to non-users of TICs) to spend less time in hotels, less time

overnighting with friends, and significantly more time camping (43.2% vs 22.3%). As might be expected they also show a higher proportion travelling in recreation vehicles (RVs). With 22% of non-resident TIC users travelling in RVs, it is extremely important to have easy access for these large vehicles. These data are shown below.

		Those Who Visited Centres	Those Who Didn't Visit Centres
Accommodation:	Hotel	10.9%	17.1%
	Motel	32.5	29.5
	Resort	0.5	0.4
	Friends/relatives	11.3	27.2
	Cottage own/rent	0.6	1.8
	Govt camp/park	18.1	7.5
	Private camp/park	22.2	12.5
	Camping other	2.9	2.3
	Other	1.0	1.7
		100.0%	100.0%
Travel Mode:	RV	21.6%	11.8%
	Auto	61.3	60.1
	Other	17.1	28.1
		100.0%	100.0%

4.1.9 Spending Patterns

The Visitors '79 data indicate that non-resident tourists who used TICS tend to be on longer trips (approximately 2.5 nights longer) than non-users, but they only spend 0.5 more nights on average in BC. (Visitors '79 data shows that non-resident TIC users spend on average 15 nights away from home.)

Visitors '79 data show no difference in expenditures between non-resident users and non-users of TICs. (The average expenditure rate was $21.50 Canadian per person per day.) This finding does not rule out the possibility that TICs encourage spending by users. The number of stops a visitor makes at TICs during a trip is expected to be low. The success rate for increasing spending by adding attractions or extending a stay is certainly less than 50%. Therefore, when

the additional spending is spread over the duration of a visitor's 2 week vacation, the average expenditure per person per day is not likely to be significantly increased. It is also possible that this group of people (TIC visitors) would have spent less than non-TIC visitors if they hadn't been encouraged by TICs to spend more.

4.2 General Tourism Trends as They Relate to TICs in BC

4.2.1 Trends

Our review and analysis of short- and long-term tourism trends are presented in detail in Appendix C (Volume II). The general trends are summarized below.

(1) High energy prices are affecting people's travel plans and the tourism industry in general. However, the magnitude and the long-term effects of these developments are not clearcut. It is expected that North American residents will continue to travel, but their trips will involve shorter distances. Package tours will be favoured over touring vacations in an automobile. Although most planners predicted a long-term relative decline in the "rubber tire" market, this has not occurred to any significant extent. The current recessionary economy may have delayed or altered this decline.

(2) A study recently completed by DPA Consulting for the federal tourist department (formerly CGOT) shows that the overseas market continues to be the most rapidly expanding market segment in Western Canada. For the four western provinces combined, overseas visitors increased their share of international travel from 5% in 1976 to 11% in 1980. Although the majority of overseas visitors are from the United Kingdom and West Germany, the new Pacific Rim market has expanded significantly, particularly in BC. Using 1982 BC data, our study

points out that overseas visitors tend to stay longer and spend more than other groups -- they spend about $37/day and stay an average of 10 days; visitors from the US spend about $34/day and stay an average of 4.2 days.

(3) Travel between the four western provinces from 1978 to 1981 expanded at nearly double the rate of in-province travel. Visitors from the western provinces could account for a growing proportion of the BC tourism market in the coming years, although the role of visitors from Eastern Canada and from the US may decline over the long-term.

(4) Despite expectations of growth in person-trips and tourism expenditures for BC between 1978 and 1982, no growth has occurred. The growth figures by market segment are as follows:

Segment	1978-1982 Average Annual Growth in Person-Trips (%)
BC Residents	-4.1
Other Canadians	4.6
United States	4.3
Overseas Visitors	7.5
Total	**0.0**

The growth in out-of-province market segments has been totally offset by a decrease in BC resident travel within the province. Both tourism revenue and the number of visitors showed serious year-over-year declines in 1982. The largest decline in person-trips was recorded by BC residents and the smallest by overseas visitors. Total person-trips fell from 13.2 million in 1979 to 11.5 million in 1982.

(5) There will continue to be pressure on the Canadian balance of payments and the value of the Canadian dollar is expected to remain low relative to other currencies. This will tend to keep the cost of Canadian vacations competitive with alternative destinations.

4.2.2 Implications for Tourist Information Centres

(1) The Visitors '79 study indicates that the proportion of tourists visiting the information centres increases with the tourists' distance from BC. Given the growing importance of overseas tourists in the BC market, over time, a rising proportion of tourists can be expected to stop at TICs in BC.

(2) The increasing propensity for Western Canadians to travel suggests there may be a substantial increase in the number of first-time visitors to BC from the three other Western provinces. First-time visitors may have a greater inclination to stop at information centres, providing further growth to the centre's client group.

(3) The services, brochures, and other promotional material should be increasingly directed toward the overseas visitor. This view reflects a number of factors:
- this market segment is expected to experience the highest growth
- overseas visitors take longer trips on larger, and probably more flexible budgets; consequently, there is a greater probability for the centre to influence the length of their stay in the province and/or the number of attractions they attend
- overseas visitors tend to be both demanding and discriminating; if the TICs can satisfy these visitors' requirements, they will be in a good position to satisfy the needs of other market segments.

(4) The tourism market is becoming increasingly competitive and sophisticated. The competition factor means that the services and information materials provided by the TICs in BC must be competitive with other jurisdictions' in terms of quality and price. The growing diversity and sophistication means that the TICs must be able to

cater to the needs of different types of tourists. This places a higher priority on use of well-trained staff who possess a sound knowledge of the province's many tourism assets. The larger centres will likely be in a better position to meet the competition and cater to these diverse requirements.

(5) Both resident tourists and visitors from outside the province have evidenced a growing concern for overcrowding at major recreation facilities and are increasingly aware of the potentially negative effects tourism can have on the environment. Information centre staff could increase their efforts to encourage visits to alternative facilities and to encourage return trips during the off-season or shoulder seasons.

(6) The development of destination resort areas plays a major role in the province's tourism strategy. Destination points are needed to attract a high growth segment of the tourist market. Consideration should be given to providing TICs near existing destination resorts which are experiencing significant increases in visitations, to totally new destination points, and to regional airports which are gateways to expanding tourist areas.

(7) Information centre programs should be able to respond flexibly to changes in the economic cycle. During a slump, the TICs could be geared toward meeting the needs of people on short, low-budget vacations. These people would be more interested in adding attractions (especially low-cost attractions) than extending their stay in BC. As/if we move out of the recession, the number of people on extended, high cost trips may increase. Greater efforts could then be focussed on services and information directed toward extending the tourist's stay in BC.

5.0 INFORMATION CENTRES IN OTHER JURISDICTIONS

5.1 Tourist Information Centre Systems in Other Provinces

5.1.1 Overview

As part of our background research, we contacted the equivalent of the Ministry of Tourism in nine Canadian provinces and one territory to review their system of tourist information centres.

All provinces operate a series of tourist information centres which are responsible for serving tourists at major border crossings, along major traffic routes, and at selected provincial attractions. In each province, there is also a group of independent tourist centres which provide regionally and municipally focused information.

Table 5.1 indicates that the size of each system of information centres varies substantially from 8 centres in the Northwest Territories to 291 in Ontario. Quebec (187 centres), Alberta (218), and Ontario (291) have large networks with a scope similar to that found in BC. Only New Brunswick and Prince Edward Island have tourist information networks where the number of provincial centres represents more than 40% of the total number of centres. The bulk of the area in almost all provinces is, therefore, serviced by non-provincially run centres. Table 5.2 compares the ten provinces in terms of the number of centres and travel receipts per centre.

5.1.2 Administration

The degree of provincial control over the tourist information centre networks is generally limited. In six of the provinces (including Alberta, Ontario, and Quebec), there is a 3-tiered system which involves centres operated by the province, Regional Tourist Associations, and municipalities

TABLE 5.1: TOURIST INFORMATION CENTRE SYSTEMS OUTSIDE BC

Centres & Level	Standardization	Use of Video Presentations
BC (for comparative purposes)		
10 Provincial 1 Regional 133 Local (includes satellites)	No standardization at provincial level	No use of video at any provincial centres
Alberta		
18 Provincial (8% of total) 25* Regional 175* Local	Provincial TICs use teepee design or new modular format	2 large provincial centres with substantial investment in video equipment
Saskatchewan		
9 Provincial (21% of totl) -- Regional 33 Local	No provincial format. Considering standardization in design or layout for future.	Each provincial centre is equipped with video cassette recorded (VCR)
Manitoba		
13 Provincial (24% of totl) 38* Regional 2 Local	New modular format for provinc'l centre may become standard.	3 provincial centres use slide show presentations displayed on small TV monitor
Ontario		
41 Provincial (14% of totl) 250* Regional, Local	Provincial TICs are characterized by green metal roofs.	A few provincial centres use slide presentations of attractions in major communities
Quebec		
7 Provincial (7% of total) 100* Regional, Local	Provincial flag identifies Que. centres. Each has unique design.	No use of video at any provincial centres.
New Brunswick		
16 Provincial (44% of totl) -- Regional 20* Local	No standardization at provincial level.	Most provincial centres have slide shows presentations on a VCR.

... continued

TABLE 5.1: TOURIST INFORMATION CENTRE SYSTEMS OUTSIDE BC continued

Centres & Level	Standardization	Use of Video Presentations
Nova Scotia		
10 Provincial (18% of totl) -- Regional 45 Local	No standardization at provincial level.	5 provincial centres have small theatre (20-30 stools with 5 min show). Some C of C operations have slide show presentations.
Prince Edward Island		
10 Provincial (77% of totl) 2 Regional 1 Local	No standardization at provincial level.	1 provincial centre has small theatre (30 seats and a continuous film on the province)
Newfoundland		
5 Provincial (38% of totl) - Regional 8 Local	Provincial TICs are similar (like a ship under sail).	All provincial centres have either VCR units or slide show equipment with TV monitors.
Northwest Territories		
3 Provincial (38% of totl) 5 Regional / Local	No standardization at provincial level.	2 provincial centres have slide show presentation available on request.
Parks Canada		
6 in Nat'l Parks Located in BC	No standardization of design or size.	Larger interpretative centres have visual presentations of attractions, trails, & seasonal scenery. Some use small theatre.
Tourism Canada		
1 in Ottawa 1 in New York	Not appropriate.	The domestic office offers wall screen designed to allow slide and film presentations from a rear projecting set-up.

* These numbers are estimates.

TABLE 5.2: COMPARISON OF NUMBER OF TOURIST INFORMATION CENTRES AND TRAVEL RECEIPTS BY PROVINCE

Province	No. of Centres	Total Travel Receipts 1980 $'000	Travel Receipts Per Centre $'000
British Columbia	144	2,287,600	16,000*
Alberta	218	1,649,000	7,600
Saskatchewan	42	579,600	13,800
Manitoba	53	649,000	12,200
Ontario	291	4,701,200	16,200
Quebec	107	2,630,700	24,600
New Brunswick	36	327,600	9,100
Nova Scotia	55	377,100	6,900
PEI	13	116,100	8,900
Newfoundland	13	290,000	22,300

Sources: DPA survey of BC and other provinces' centres and the Regional Data Base of the Canadian Government office of Tourism.

*This figure may tend to be low because the numbers of centres in other provinces may not include satellite locations while BC's figures do.

or Chambers of Commerce. As in BC, the non-provincially run centres are reasonably autonomous. In the larger networks, the Regional Tourist Associations appear to take a more active role in the coordination of local centres than they do in BC.

In the provinces which provided funding information about the local centres, all suggested that either the federal or provincial government provided funds to partially cover travel counsellors' wages. They also reported that these programs were important to the continued functioning of the centres.

The provision of operating grants to non-provincial centres is not a universal offering and the size of the grants which are provided varies from $450 to $1,250 per centre. Some provinces have cutback their support due to budget restrictions. For example, Saskatchewan has dropped their operating grant subsidy and Manitoba is mounting a campaign to encourage recognition of the value of tourist information centres and to encourage movement toward self-sufficient centres. In several provinces (including Alberta and Nova Scotia) the Regional Tourist Associations are paid operating grant funds for redistribution to the local centres. In Ontario, each Regional Tourist Association receives an allocation of students whose wages are subsidized (approximately 329 students in 1983 @ $1,231 per student). The students are allocated to local and RTA run centres within the region. Most of the students are used as travel counsellors. (They are not trained by the Provincial government.)

Two unique funding cases are worthy of note:

Northwest Territories: two provincial centres are run by individuals on a contractual basis.

Newfoundland: when establishing the present tourist

information centre network, the province provided seed money to local groups to help cover the cost of the original capital outlays.

5.1.3 Problems (in other provinces)

The following problems were mentioned during conversations with other provincial contacts:

- . insufficient funding in general
- . inadequate signing in general
- . inadequate staff training at the local centres
- . parochial attitudes at the local level
- . poor communication among provincial centres, local centres, and the provincial tourism administration
- . lack of an accurate, up-to-date database for reference
- . low degree of public awareness of the centres.

The first three problems were mentioned most often and are discussed below.

Funding. In most cases, the funding problems affect both the provincial and local administrations. The problems are similar to those experienced in BC, and are largely the result of reduced resources and general budget cutbacks at all levels of government and in the private sector. The funding concerns are not considered serious enough to threaten the effectiveness of existing networks of tourist information centres in any province.

Signing. It is perceived that many tourists drive by the tourist information centres without stopping or cannot find them. This is due, in part, to:

- poor understanding of the service available at centres
- inconvenient placement of centres
- a lack of appropriate signing.

It is generally assumed that if the signs communicated better, more tourists would stop. It is also assumed that

there is a basic need for travel information and that increased awareness of the location of information centres would cause an increase in centre usage. The primary signing concerns mentioned by the provincial representatives contacted were:

- the low level of communication imparted by the standard sized "? - 1 km" sign located on a high speed thoroughfare
- the lack of appropriate on-site signs that communicate specific services.

The opinions of the provincial contacts varied, but the following suggestions for improved signing were made:

. **Increase awareness of the "?" sign.** If travellers become familiar with the "?" , they will consider stopping for information when they see it.

. **Use large approach signs.** Large, high quality approach signs (e.g., 4 ft by 8 ft) which display international service codes and the provincial logo would indicate the approach of a facility worth using.

. **Use visible on-site signs.** The TIC location must be well marked and should be visible as tourists approach (e.g., an information symbol and a provincial logo displayed with backlighting on a 20 ft pole).

Staff Training. With the exception of the Northwest Territories, formal staff training courses are offered to all provincial travel counsellors. Courses vary in length from 2 to 5 days and in content from sales to awareness of the things to see and do in the province. At least 5 of the provincial programs specifically include a day or more for a familiarization trip or presentation. The training topics covered include:

- role of the travel counsellor
- how to use the information available

- how to handle people and complaints
- effective communication
- selling the province
- the travel counsellor's image (e.g., appearance).

It was mentioned that in many cases the training offered to local centre staff was handled by the Regional Tourist Association. However, it was often not conducted by professionals. Many local staff are apparently trained on the job, and they lack the appropriate level of provincial tourism knowledge.

5.1.4 Fees for Service

None of the other provinces charge a fee for normal provincial promotional material (e.g., road maps and accommodation guides). In 1983, Nova Scotia experimented with a $3.95 value sticker for its tourist brochure. The brochure includes a road map, an accommodation guide, a tour guide, an events calendar, and a vacation guide. The response was definitely negative. If a fee had actually been charged, US visitors were apparently willing to comply, but Canadians were not. No decision on a future strategy has been made at this time.

Alberta has also considered putting a nominal fee on its brochures, primarily to reduce waste rather than to cover printing costs. However, there are no plans at the present to institute such a program.

In Quebec, the maps and standard brochures are provided free, but they sell a specially produced, glossy guide to Quebec for $9.95. New Brunswick and Prince Edward Island sell provincial posters at $2 and $1, respectively.

Until there is a general change in Canadian provincial policy, individual provinces would likely be taking a risk if they instituted a fee for services. The Quebec experience

indicates the potential for the sale of a high quality souvenir brochure. However, the economics of such an action have not been examined.

5.1.5 Standardization

Table 5.1 illustrates the degree of building standardization in each province. Only 4 of the 9 provinces and one territory contacted are committed to some level of building standardization at the provincial level. Standardization has not been attempted at the regional or local levels. The most standardization of tourist information centres occurs in Alberta and Ontario. In both cases the provincial contacts believe that tourists readily identify the provincial service image with the standardized appearance.

Other provinces expressed the opinion that a provincial flag or good standardized signing sufficiently identifies provincial centres, and allows each centre to reflect the local flavour in a unique building design.

In the past, Alberta centres used a teepee design to provide a strong visual identity. Their new concept for a large format information centre will incorporate a steeply peaked blue roof which is shaped like a pyramid. The rest of the building's design will be flexible and will use local materials such as concrete, stone, and wood.

Ontario uses a variation on the standardized building approach. The provincial centres are identified by their green metal roof and by their pod design in the walls. These pods create spaces which are used primarily for counselling activities and are readily visible from the outside.

5.1.6 Use of Video Presentations

Quebec is the only province contacted which does not offer some form of video presentation in at least one of its

provincially operated centres. Table 5.1 briefly describes the extent of video use in each province.

Video use varies from slide shows to video cassette recordings to promotional films. Some centres use a slide projector with a wall screen or TV monitor, while others have a small theatre with seating for 10-20 visitors, rear projection screen, and multiple film projectors.

The video presentations are intended to:

- add flair to the presentation of information or to the marketing of the province
- provide a visual presentation of many areas of the province and encourage return visits
- present different seasonal aspects of the province which can only be touched upon by posters
- highlight provincial attractions which may enhance the travel counsellors' selling impact
- present a committed, professional image of tourism.

Video promotions are considered to be a valuable promotional tool.

5.1.7 Accreditation and Brochure Policies

Although provincial control over the centre network is generally limited, Ontario uses a formal accreditation procedure. Provincial government field representatives visit local centres once per year and report on the physical conditions and quality of service provided. To obtain accreditation, a centre must meet the following criteria:

- use at least one brochure rack
- have sufficient reception area to service visitors
- keep government literature visible, but only available to visitors on request (reduces waste)
- maintain adequate stocks of reference material
- have all counsellors trained by the RTA program
- provide an operating schedule two months prior to opening (allows time to arrange highway approach signing)

- must be open for six concurrent hours (excluding lunch) and must be open for nine concurrent weeks
- must post hours of operation
- must report the number of visitors served (one inquiry per party of visitors).

Accredited centres receive the following:

- all provincial promotional literature
- subsidized students (indirectly)
- giveaways embossed with the provincial logo, e.g., buttons and pins, plastic bags for the literature, postcards.

The area of brochure acceptance policy was not addressed in all provincial interviews. In Saskatchewan and Quebec, the policy has been to accept any tourist related promotional brochure from the private sector subject to specific rules covering content and quality. Quebec has encountered problems with:

- a tendency to display too many brochures
- competition for rack space among individual private operators
- shortages of brochures from particular operators.

For 1984, Saskatchewan has decided to pursue a more restricted acceptance policy, similar to the one operating in BC. Quebec is also considering changing its open policy.

5.2 Tourist Information Centre Systems in England and the Netherlands

5.2.1 Overview

In 1975, BC Research Ltd. prepared a report entitled, "The Role of Travel Information Services in Tourism Management -- A Critical Review and Case Study", for BC's former Department of Travel Industry. At the time the report was written, England and the Netherlands were considered world leaders in

tourism marketing and both were successfully using a network of tourist information centres. In both countries, emphasis was placed on maintaining professional standards of tourist services. Both countries also used a 3-tiered national network of TICs which relied on strong Regional Tourist Associations. The two TIC systems are summarized below as they were described in the BC Research report.

5.2.2 Network Objectives and Criteria -- England

The responsibility for the promotion and development of tourism in Britain (as outlined in the BC Research Report) is divided as follows:

- The British Tourist Authority has responsibility for the promotion overseas of tourism to Britain.

- Three Tourist Boards (England, Scotland, and Wales) have responsibility for developing tourism in their areas and for the publicity within the United Kingdom. They develop national policy and coordinate the activities of their subordinate regional boards.

The rest of this section deals primarily with the English Tourist Board which is comprised of 11 Regional Tourist Boards which handle local tourism activities.

The English Tourist Board has the following objectives:

- to link all individual centres into a network with a recognizable corporate image
- to create a hierarchy within the network
- to ensure a high standard of information counselling throughout the network and to encourage a professional attitude towards the work
- to advertise the network and to encourage its use
- to increase the sense of "esprit de corps" and the sense of professionalism among the Information Assistants.

The network concept was developed in a way which would provide participants with national promotional material, an advisory service, and a variety of other benefits depending on the scope of the operation, as well as allow maintenance of local government control.

To become a recognized tourist information centre, the following criteria must be met. The centre must:

- be recognized by the local authority as an official tourist information service,
- be prepared and able to display the national standard Tourist Information sign,
- have adequate reception facilities for visitors,
- have at least one member of staff competent and available to service visitor inquiries,
- be open at least normal office hours between May and September and, ideally, during evenings and weekends as the demand warrants,
- have adequate display facilities for maps and posters,
- be able to display information.

All tourist information centres display a sign incorporating the English Tourist Board logo (an English rose), the words "Tourist Information" in a specific colour scheme, and the international symbol for information -- "i". Standard directional traffic signs were designed and erected. (The signs include a design for pedestrians in a city environment, a design for directing traffic at a major intersection, and a design for use when a centre is directly ahead.) Summer and winter uniforms were designed and staff at about 50% of the centres adopted them. A badge with the logo and the words "Tourist Information" is also provided for each travel counsellor.

5.2.3 Structure and Support -- England

To achieve the second objective, the following hierarchy was set up:

. Point of Entry Centres -- managed by the regional tourist boards.

. National Centres -- managed by local municipalities and provide general information on the country, the region, and detailed local information. There are 250 centres at this level.

. Regional Centres -- managed by local municipalities and provide regional information and detailed local information.

. Local Centres -- managed by local municipalities and provide detailed local information only.

To achieve the third objective, each centre is provided with a reference kit and a reference manual. National Centres also receive:

- a cash grant to improve and maintain displays
- free photocopying service
- mounted maps of the region and the UK
- financial support for the production of local information leaflets.

To achieve the fourth objective, a booklet is prepared which lists all tourist information centres along with their level, address, and phone number. These booklets are distributed at major traffic points (e.g., airports, ferries, and rail stations).

The fifth objective is achieved by the provision of uniforms, high quality reference materials and displays, and the production of a newsletter.

The English Tourist Board provides a grant to the regional tourist boards to cover the cost of training programs. The training for counsellors involves a familiarization tour of the region and lectures on some of the following topics:

- use of reference books
- reading timetables
- practical displays
- how to operate a Tourist Accommodation Service
- dealing with tourists
- information collection
- national parks
- office management.

Training for managers includes tours of large, successfully managed centres and annual seminars.

The English Tourist Board prepares the following informational brochures:

. Activity Holidays -- provides details on outdoor and activity oriented holidays. Each regional board develops an inventory of tourist attractions and facilities. The local centres act as the major vehicle for detail collection.

. Event List -- provides a list of events which are likely to interest tourists. The list is published every quarter and is used mainly by travel counsellors.

. Information Sheets -- provide information on a variety of topics of interest to tourists. The sheets are designed to facilitate travel counselling at the centres, to speed up answering visitor inquiries, and to act as a promotional tool.

. Travel Guides -- provide information on a wide range of things to see and do. The guides use high quality pictures and sell space to local advertisers. They are designed to help residents in the middle and low income brackets plan holidays (in England).

Many of the tourist information centres offer accommodation reservation services. Each participating centre has a list

of accommodation available in the area, categorized by price, number of rooms, and facilities offered. Once the visitor's accommodation needs are determined, the counsellor makes a booking at the chosen accommodation for a nominal service charge.

5.2.4 Network Objectives -- the Netherlands

The Netherlands has a network of tourist associations (VVVs or Societies for Tourist Traffic). The coordinating body, ANVV, encourages communication between VVVs and has a mandate to maintain and improve the quality of tourism. The network includes three levels of tourist organizations: provincial, district, and local.

There are 450 VVVs operating centres in the Netherlands. Their objectives are:

- to raise the level of prosperity in a municipality by promoting the beneficial aspects of tourism
- to receive and provide information and to assist visiting tourists
- to provide guidance to residents concerning tourism and recreation opportunities in their area
- to propagate culture by disseminating information about cultural activities in a community.

The main activity of the VVVs is providing information to tourists and residents about travel, recreational, and cultural opportunities.

5.2.5 Structure and Support -- the Netherlands

The hierarchy of the Dutch centres is based on the range of information offered. Many centres are situated at destination areas where visitors are mostly interested in the place itself and its immediate surroundings. These centres do not carry the same range of information as those along the border or at other major points of entry. The three levels of centres are:

- "A" (70 of these) -- provide detailed information about tourism and recreation throughout the Netherlands.

- "B" (120 of these) -- provide general information about the Netherlands and detailed information about the district.

- "C" (260 of these) -- provide detailed information about the local area.

All centres display a flag or a standard sign with the VVV emblem.

The "A" centres maintain a list of hotels in the area, classified by quality and feature. These centres offer a hotel booking service which allows a tourist to book a reservation anywhere in the country. At the time of booking, the visitor pays the centre one night's accommodation which is remitted to the hotel (less a 5% commission and a 10% booking fee). Some centres offer a similar service for booking theatre and concert tickets.

The Dutch government prepares the following three reference manuals which are amended regularly and are subscribed to by all the VVVs:

- "V-1" -- provides details about the Netherlands according to place. Each VVV collects and documents information about its area, e.g., transportation details, attractions, events, entertainment, sports facilities, shopping, restaurants, hotels, campgrounds.

- "V-2" -- provides details about the Netherlands according to subject.

- "V-3" -- provides detailed information about the schedules of all transportation services operating within Holland and between it and surrounding countries.

The government also compiles a list of all events for the VVVs and a major events brochure for the general public. These are issued annually and monthly.

6.Ø COMPUTER APPLICATIONS IN TOURIST INFORMATION CENTRES

6.1 Computerized Information Systems in TICs Across Canada

Usage of computerized information systems has been attempted both in the province and in other parts of Canada on an experimental basis for several years.

In BC an attempt was made to use Telidon technology as a means for distributing information about tourism attractions, events, and services. This experiment was undertaken as part of one of many cross-country Telidon field trials. The field trial in BC was initiated by BC Tel with some federal financial support. It should be noted that the BC Tel field trial was not exclusively concerned with tourism information. A full range of information services was included in the experiment, including stock exchange data and general government information. The field trial had a number of terminals located in public places as well as in private and government offices. The publicly accessible terminals were encased in vandal-proof cases and could be operated through a numeric pad attached to the casing.

In our interviews with BC Tel representatives, we were advised that the tourism portion of the database received approximately 4,000 hits (i.e., 4,000 accesses) per day during July, 1983 from 80 public terminals located in Victoria and the Lower Mainland. While this represents an average of 50 hits per day per public terminal the individual terminal usage levels varied substantially.

Discussions with provincial and local officials who had terminals installed on a trial basis in their tourist information centres indicate the commercial cost of making public terminals available may not reflect the value or use level.

The reasons most frequently given for the lack of success for

the Telidon units were:

(a) The numeric key pad on the terminals was not easy to use. (The new, larger typewriter keyboards are a major improvement.)

(b) The data displayed were not necessarily up-to-date.

(c) The response time associated with the Telidon system was too slow in comparison to the speed of servicing which can be achieved by counsellors.

(d) Most users are not satisfied with only seeing the information displayed on the screen. Many of them would like to have a hard copy of what they have found.

(e) The units were susceptible to abuse by children who used them to play video games which were available in the general database.

The comments indicated that in situations where a large number of inquiries occurred at one time (i.e., as a result of unloading ferries), the availability of one or two Telidon units did not significantly increase the request handling capacity of the centre.

In Alberta, the main Travel Alberta centre in Edmonton makes use of the government computer service centre mainframe computer. They have developed an extensive tourist information database which is accessible on an interactive basis through several terminals located in the Edmonton centre. All other provincial centres are connected by teletype terminals, but do not have access to the database. The major information transmitted on the teletype equipment is the campground vacancy status.

The high mainframe connect charges have brought about a decision to lease a small mainframe entirely for the main information centre's use. The new system will have 15 terminals on line for counsellors to use in the Edmonton centre as well as 1 warehouse terminal and 2 management terminals. The current software (developed at a cost of more than $300,000) has five major functions:

- general management -- for reports, statistics, etc.
- inventory management -- for brochures, literature, etc.
- processing and mailing -- producing written responses, mailing lists, labels and envelopes; and for putting together marketing packages
- static reference -- auto tours, counsellor's manual, campgrounds, event calendar, accommodation guide
- dynamic reference -- snow conditions, campground vacancies.

The province of Saskatchewan has built a tourism database which is presently available only on a batch basis. The database is structured so that only written printouts can be retrieved. It is the province's intention to extend this system to an on-line basis using a micro and/or terminal setup for use by travel counsellors in the Regina office. This proposed system extension will not likely provide on-line service to other provincial centres. In addition to storing information on Saskatchewan's tourism product, the database will be used to produce tourism statistics and mailing lists and to facilitate other marketing activities.

Although the province recognizes that in the future some form of Telidon application may be necessary for consumer use, they do not believe that time has arrived. They feel that the present Telidon hardware and software are too slow to be useful for most counselling situations and that too much effort is required to collect and update the information which is distributed.

In addition to the work being carried out by the province, another Telidon field trial is being carried out by Sask Tel. This database also contains some tourist information. Since the system is being marketed largely to home users, its potential tourist information service is limited to provincial residents.

Manitoba presently has no computer based information system.

However, the province is considering a system for on-line access to travel/tourism information using a large mainframe in Winnipeg. The entire provincial government's approach to the use of Telidon technology is currently being investigated by DPA Consulting, on behalf of the province.

The province of Ontario has undertaken the largest single tourism information application using Telidon technology. The Telidon database consists of over 10,000 pages of tourism information about Ontario, the City of Toronto, and just recently, the City of Ottawa. The database is available through a network of publicly accessible terminals, as well as a network of teletype users throughout the country. The service is distributed by Infomart, a private company specializing in Telidon usage. The province of Ontario has made some long range plans for an on-line TIC system, but does not have the budget to warrant further consideration in the near term.

There is no computerized tourist information system used in Quebec information centres. The province did not buy many pages of Telidon space for tourism information. With little information on the system, the Telidon trial in provincial centres produced poor results. Most users were children -- they felt more comfortable than adults interacting with the terminal and they were able to access the available game packages. There is no computerized reservation system in place, but a temporary one will be set up for a major festival in Quebec City during the summer of 1984.

The province of New Brunswick, in conjunction with the New Brunswick telephone company, has plans to provide on-line access to a tourism database via telephone to all key travel information centres. The plan is expected to come into effect within one to two years. The intention is to provide major information centres with up to four terminals -- one for each travel counsellor.

There is no computerized information service in any Nova Scotia centres. However, there is a private company (operating the "Check-In" system) which offers a computerized reservation facility from anywhere in Nova Scotia and in Maine, toll-free.

In Prince Edward Island, there is no computerized information system in the provincial centres.

In Newfoundland, Telidon terminals have been installed in six major hotels and in the large interpretive tourist information centre operated by the province. The database contains vacancy information which is updated every 24 hours and is used by visitors to make accommodation decisions.

In addition to a number of provincial initiatives making use of Telidon or other computerized information services, the Government of Canada owns, and makes available across the country, a significant tourism database via Cantel. The tourism database contains over 3,000 pages of information about major attractions and events. An attempt has been made to ensure that the sample of attractions included in the database are representative of each province. The service can be accessed by the public through a variety of terminals in special federally-operated centres. In some instances, other Telidon users who subscribe to Informart Telidon services also have access to this database.

6.2 Assessment of Current Experience with Computerized Tourism Information Databases

BC's own experience with the use of Telidon technology is probably representative of this technology's strengths and weaknesses in communications between members of the general public and a major centralized database. It is quite clear that Telidon technnology is not a panacea for all information dissemination problems. Direct use of Telidon technology by the public (in and out of information centres) may not be

appropriate. Visitors with information requests have expectations of response time which may be beyond what the system can provide. However, in instances where the Telidon information is being supplied at a location such as a hotel, it is conceivable that tourists would have more time to search through databases and plan the next day's activities.

Therefore, we conclude that in the case of tourism information centres it is more appropriate to consider the use of computerized information dissemination and retrieval systems for use by travel counsellors rather than by the general public. In this way, the system would provide a means of increasing the productivity and effectiveness of the travel counsellors by providing them with an easily referenced source of consistent, objective information on the tourism product.

Consideration of a new tourism information system should include assessing its ability to communicate on a real time basis with major tourist information centres and travel counsellors. Good communications at this level would provide the province with an opportunity to manage the marketing effort of centres more directly on a day-to-day basis. For example, if the province is interested in drawing certain events or attractions to the attention of visitors, they can do so by posting special messages and instructions to travel counsellors via the database.

It should be kept in mind that a computerized information database is best used as a reference when questions are asked which the travel counsellor is unable to answer. The electronic database is a source of consistent information which travel counsellors become familiar with by reviewing it during slack periods and referring to it if required. It would be particularly valuable when handling detailed requests concerning the events or attractions in other regions. In locations where a large manual database is currently used to service the travelling public, the system

would reduce response time and allow travel counsellors to maintain "eye contact" with visitors. In general, such systems should be viewed as productivity enhancement tools for the counsellors, which have the potential to significantly increase the effectiveness of their marketing.

Our assessment of the use of computerized information databases suggests there is a very major difference between providing travellers with information and providing a reservation-making service. The province of Nova Scotia is the only province that currently provides a computerized accommodation reservation service which is widely publicized and easily accessible.

Several years ago, the federal government undertook a major study of the factors involved in introducing a national information/reservation system for Canada. The study identified a number of technical and institutional problems which make it very difficult for government to be directly involved in the reservation making process.

We believe that if the province wishes to encourage the development of a provincially-based reservation service, it should do so by encouraging or possibly sponsoring one or more private companies. (Establishing a telephone line from major information centres to one private firm offering a reservation service to a wide variety of accommodation operators throughout BC is one alternative which would provide visitors with a reservation service.) Direct involvement by the province in the reservation field would require the commitment of extraordinary effort and resources to ensure its fairness and objectivity.

6.3 Available Alternatives

In our view, there are three major alternatives available to the province for providing computerized tourism information at its centres. These are:

(1) use a stand-alone micro-computer
(2) use communicating terminals
(3) use communicating micro-computers.

As was indicated in the previous section, we believe that the use of computerized information databases should be limited to access by travel counsellors rather than the public at large. The following briefly describes each alternative above and highlights its advantages and disadvantages.

The use of stand-alone micros for the dissemination of tourism information could be achieved by creating special diskettes of the retrievable data about BC's tourism product. These micro-computers, which range between $2,500 to $5,000, are capable of a multitude of tasks over and above simple information retrieval. It is conceivable that special programs could be developed to assist travel counsellors in their jobs. The diskettes could be distributed by mail to the tourist centres and used throughout the peak seasons. Information could be updated every two weeks to a month.

The advantage of this alternative is that any tourist information centre with access to electricity would be able to provide the computerized information service. Since the micro-computers would not be required to communicate with an outside machine, the response time for information retrieval would be quite fast. The disadvantage of this alternative is that since there is no communication capacity, updates and changes would not be instantaneous.

The use of communicating terminals would be more economical from a capital investment point of view than the previous alternative. Communicating terminals can be purchased and installed for about $1,000. However, communication between terminals would require a dedicated telephone line of reasonable electronic quality. In addition to long distance or line charges, the use of the terminals would have computer related costs at the distribution end. These costs would

depend upon the size of the database which would be made available to the travel counsellors and the kind of supporting utility programs which would be available to them.

The third and final alternative, which is a combination of a micro-computer and communications capability, provides, in our opinion, the best of both worlds. Unlike the second alternative, a dedicated line may not be required and communications could be made using a modem when necessary. With this kind of configuration, information on the database disks could be updated automatically over night.

Comparative costs and basic parameters of these three alternatives are represented below.

Tourism Information System: Basic Parameters

	Stand-Alone Micros	Dumb Terminals	Communicating Micros
On-site Hardware (Per Site)			
Terminal	$2-5000 (floppies)	$800-1000	$2-5000 (floppies)
	$7-10000 (hard disk)		$7-10000 (hard disk)
Modem		$700	$700
Communications (Per Site)			
Datapac service chg (per mo)		$130	$130
Dataline (per mo) (Remote sites only)		$200-1000	
Datapac Usage chg (per 100 pages)		$1	
Long Distance (per 100 pages)		$35(prime)	$15(night)
Computer Costs (per Site)			
Service bureau:on line (per mo)		$500	
Service bureau:dial up (per connect-hr - non prime time)			$5-20

	Stand-Alone Micros	Dumb Terminals	Communicating Micros
Capacity	200 pages per floppy	tens of thousands of pages	200 pages per floppy
	5000 pages per hard disk		5000 pages per hard disk
Response Time (per page)	1-2 secs	10-20 secs	1-2 secs

In all of the above alternatives, it should be possible to include a hard printing output facility so that information displayed on the screen could be output in paper format for reference or for passing on to visitors.

The question as to whether the information database system should be Telidon-based is largely open on all of the alternatives. At this time, there are a number of micro-computers which have the capacity to decode Telidon protocol. This capacity is either in the form of special software or plug-in chips. In general, the ability to communicate in Telidon format would require some additional costs. From the point of view of the province, the key factor affecting the use of Telidon technology is that it provides a relatively simple means of communications which would probably require less training than use of normal computer systems. An additional attractive feature is that the Telidon technology provides an opportunity to display graphic information such as maps and diagrams which may be more efficient ways of transmitting information than simple text.

An additional feature which might be important to the province in the selection of a communication protocol is that with the growth and development of Telidon technology, the existence and use of Telidon pages may be useful to the province for marketing the tourism product outside the

provincial boundaries on national or private tourism databases. The use of special mini Telidon packages which can be transported to expositions and fairs may also be an attractive feature.

7.Ø DIRECTIONS FOR CHANGE

7.1 Problems at the Centre Level

7.1.1 Signage and Other Physical Problems

During our field research, we visited 56 centres (including satellite locations) in BC. The most common problem appeared to be a lack of appropriate signing. Of the 56 centres visited, 43% were considered to have one or more of the following signing problems:

- lack of a highway sign notifying travellers they are approaching a tourist information centre
- sign misplacement which confuses travellers about the actual location of the centre
- lack of a readily visible on-site sign which identifies the structure or site.

Although the first type of problem is most common (observed in over half the TICs with signing problems), the last one is the most serious. Without good on-site signing, travellers may not be able to find the TIC, even if they know there is one in the area.

All signs should be:

- visible to major traffic flows
- eye-catching
- easily recognizable (use standardized formats, wording, or logos)
- clear indicators of the TIC location.

Other observed problem areas which exist at some TICs are:

. Parking
- insufficient (free) parking close to the TIC
- insufficient manoeuvring room for large vehicles

. Size
- inadequate space for brochure display (8 of 2Ø locations

where in-depth staff interviews were held indicated the need for extra display space)
- inadequate space for queue in front of counsellors
- inadequate space for visitor rest area

. Location
- poor visibility from major approaches
- difficult access to parking area (e.g., placement on wrong side of road for incoming tourists)

. Appearance
- external repairs and maintenance needed
- lack of order to brochures; too many interior displays

Table 7.1 lists the centres visited, along with brief comments concerning possible areas for improvement.

7.1.2 Funding

Funding is a major concern for most TIC managers. Running an effective TIC requires a substantial financial commitment from service organizations such as the local Chamber of Commerce. As outlined in section 3.1.7, operating budgets can become very large when TICs undertake major promotional activities.

The wage bill represents the largest expense item for most centres (up to 80% of the budget). The available budget will have a significant effect on the number of staff employed and, consequently, on the quality of service.

The following staff-related funding problems were noted during the field research. (These do not apply to all centres.)

. The budget is insufficient to hire the appropriate number of staff. Of the 20 centres where indepth staff interviews were conducted, 7 indicated the centre was understaffed by one person.

TABLE 7.1: CENTRE OBSERVATIONS

Centre	Problem Areas: Signing	Parking	Location	Size	Appearance	Other	Comments
Osoyoos *	X						- Needs additional approach signs on the hwy. On-site signage good.
Osoyoos	X					X	- Located in shopping plaza; on-site sign only visible from one direction. (Only 5 min walk from BC centre.)
Oliver	X		X	X			- No on-site sign. Housed in a fruit stand. Access from south requires crossing double line on major route. Display area well used but very small.
Penticton (N)							- No problems.
Penticton (S)			X				- Located back from hwy and not readily visible.
Penticton (Main)	X						- Located on beach; poorly signed on approach streets.
Kelowna (S)	X		X	X			- Very small; sits at back of large vacant area; not visible from road; entrance easy to miss.
Kelowna (N)							- No problem.
Vernon (S)						X	- No indoor washrooms; use outdoor portable toilettes).
Vernon (Main)			X				- Too close to south centre, therefore not much volume; off tourist path, but well-marked.
Vernon (N)					X		- Housed in renovated motel; looks like motel; new, but low budget interior appearance.
Salmon Arm (Town)	X			X			- Sign on building partly obscured by tree. Little more than a hallway with brochure racks.
Salmon Arm (N)						X	- Outside washrooms only.
Salmon Arm (S)						X	- Outside washrooms only.
Chase				X		X	- Very small; no phone; outdoor toilettes at rest stop.

... continued

TABLE 7.1: CENTRE OBSERVATIONS continued

Centre	Problem Areas						Comments
	Signing	Parking	Location	Size	Appearance	Other	
Enderby	X				X		- Housed in poorly lit cabin needing repairs. Interior cluttered; sign on roof fallen down.
Kamloops (Main)			X				- Off main tourist traffic, but well signed.
Kamloops (E)			X		X		- On wrong side of hwy to catch incoming traffic; relatively bare inside with few brochures.
Kamloops (W)				X			- Very small; limited space for brochure display.
Ashcroft	X			X		X	- Received no funding; now operated part-time; quite small; no on-site sign.
Hope	X						- Approach sign is confusing.
Sidney (Main)						X	- No public washroom.
Sidney (1st St)		X					- Parking limited to street only.
Victoria		X					- Parking limited & not readily visible; self-serve sign inside may discourage asking for help.
Duncan							- No problems.
Lake Cowichan							- No problems.
Chemainus	X		X		X		- Located in motor hotel; on-site sign poor; cluttered, low budget appearance inside; access difficult, must cross double line north or make right angle turn south.
Ladysmith	X			X			- Hwy sign misleading, place on wrong corner; centre small; located in bar of hotel (museum) from 1900s.

... continued

TABLE 7.1: CENTRE OBSERVATIONS continued

Centre	Problem Areas						Comments
	Signing	Parking	Location	Size	Appearance	Other	
Nanaimo (Cassidy)						X	- No staff phone; washrooms are outside.
Nanaimo (Main)		X					- No space for RVs to turn around; housed in museum building off tourist path, but well signed.
Parksville							- No problems.
Qualicum Beach							- No problems.
Qualicum Bay		X				X	- New; low on brochures; limited parking; building blends well with adjacent homes, partly obscured from hwy.
Courtenay							- No problems.
Campbell River	X						- No sign on building.
Golden *							- From Alberta no "?", uses large brown sign with white lettering; centre resembles ski lodge .
Golden	X			X		X	- Small with few brochures; no road signs; sign on building is small; is a Red Caboose.
Radium	X			X		X	- No phone; no washroom; no "?" on hwy; small interior area; temporary building.
Invermere		X					- Right angle pull off hwy required.
Kimberley		X		X			- No visible parking, but good behind centre; very small waiting area; limited display space.
Yahk *					X	X	- Uses outside washrooms; exterior needs paint on one side, looks better from back.
Creston						X	- Displays mainly local C of C material, other brochures kept under counter.

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TABLE 7.1: CENTRE OBSERVATIONS continued

Centre	Problem Areas						Comments
	Signing	Parking	Location	Size	Appearance	Other	
Nelson	X	X					- Road sign misleading; on-site sign small; street parking only.
Cranbrook	X						- No "?" on hwy; large on-site sign.
Terrace	X						- Poor signing into Terrace; shares building with C of C and museum.
New Hazelton						X	- No brochure racks, brochures are on large counter.
Smithers						X	- Located in old "club" rail car; few brochure racks visible.
Prince Rupert							- Housed in entrance of the museum.
Williams Lake	X						- Hwy sign poor; shares building with museum.
Whistler	X	X					- No hwy sign; sign on building is small; roadside parking only.
Gibsons	X						- Poor hwy signing; needs more prominent on-site sign.
Robson Square *	X	X					- On-site signing could be better; few signs on approaching streets; parking ample but hard to find.
White Rock	X	X					- No sign on street approach from Douglas Crossing; parking on street only; too many posters and maps on walls, cluttered.
Douglas Crossing *							- No problems.
N. Vancouver	X						- Good on-site "?", but nothing on approaches.
Vanc Airport *	X						- Not well signed.

*Provincially operated

- Funding is inadequate to hire off-season travel counsellors. There are few government subsidy programs which apply to non-summer non-student workers.

- The uncertainty associated with the student wage subsidy programs offered by the federal and provincial governments makes planning difficult. It can also delay the hiring process and cause scheduling problems for training travel counsellors. The uncertainty also encourages some organizations to overstate their staffing needs on their application forms in an effort to ensure funding for a minimum number of students.

During our research, representatives from sponsoring organizations and the Regional Tourist Associations were asked to consider some specific funding alternatives for the TICs. The results are shown in Table 7.2. The funding source which received the most support was the municipality. It was suggested that this could be accomplished by earmarking a proportion of city taxes or business license funds or by contracting to provide a specific range of services for a fee. This method is currently used in some BC communities.

Interviews with representatives from the sponsoring organization identified the following other funding possibilities:

(a) sponsorship or organization of special fund raising events which also have public relations value, e.g., festivals, dances, bingo nights

(b) fees for service rendered, e.g., a convention reservation system, group tour coordination, coordination of joint advertising for private operators, seminars, holiday package booking (e.g., skiing), direct dial telephone lines to accommodation operators for visitor reservations

TABLE 7.2: FUNDING ALTERNATIVES CONSIDERED BY INTERVIEWEES

Alternative	Results from Representatives of: Sponsoring Organization	Regional Tourist Association
User fee for inquiries/brochures	No	No
Municipal Support	Yes: portion of city taxes or grants/ fee for service	Yes: portion of city taxes or business license revenues
Levy on tourist-oriented businesses	9 Against. 3 in favour. Definition problems are foreseen.	No: Enough taxes on tourist operation already.
Lotteries	4 Against. 4 in favour. If run by BC, allocation problems foreseen.	Yes: but must be run by BC. Allocation problems foreseen.
Commissions on ticket sales	No: benefits are limited & this is not appropriate for all centres	No: need large volume for significant profit; few communities big enough to warrant
Sale of souvenirs	No: limited profit; should be service, not souvenir stand; competition with private business	No: limited profit; should be service not souvenir stand; competition with private business

(c) sale of advertising space, e.g., space around map borders, space in community brochures

(d) rental of facilities (if extra space is available).

All these avenues are currently being used by at least one of the centres visited.

Representatives of the Regional Tourist Associations felt strongly that:

(a) the youth employment subsidy is vital to the operation of many centres and should be continued wherever possible

(b) receipt of the staff wage subsidy should be tied to compliance with specific criteria related to a minimum level of service or to the type of facility

(c) consideration should be given to designing a government wage subsidy program which would encourage the hiring of senior citizens (as well as students) as travel counsellors

(d) a portion of the current room and restaurant tax should be returned to the originating region and allocated among the centres as an operating subsidy.

Tourist-related business representatives indicated a reluctance to provide further monetary contributions to support TIC services. They also reacted antagonistically to the possibility of future reductions in centre subsidies. Although there was no concensus on the likely result of future funding cutbacks, the following possibilities were suggested:

- larger monetary contributions from tourist operators (possible in more affluent areas)
- larger monetary contributions from municipal sources (possible in larger municipalities or in areas with a high tourism profile)
- more fund raising activities on behalf of the sponsoring organization
- volunteer work from the tourist-oriented businesses to assist centre operation
- lower level of service provided by the centres.

These business attitudes may be more representative of relatively affluent tourist-oriented areas of the province. Business representatives from other areas may be less

supportive, less organized, or less able to meet a funding shortfall. For example, the centres in Salmo and Ashcroft did not receive funding in 1983; the Salmo centre did not operate in 1983 and Ashcroft is now operating on a part-time basis with volunteer labour.

In all cases, it is important that an appropriate level of funding be planned and organized prior to the occurrence of seasonal operating requirements of a TIC. Centre managers cannot be expected to allocate a significant portion of their time to fund-raising activities. Where the community and tourist business operators are not willing or able to provide the necessary funding, the merits or scope of the local TIC should be re-examined.

7.1.3 Staff

The centres visited appeared generally satisfied with the staff employed. However, the following problems were noted:

(a) Most of the travel counsellors are summer staff only. They are drawn from the local community's high school graduates or college students completing their first or second year. Many of these students lack experience handling the public. Often they also lack personal travel experience and so do not readily recognize the local features which appeal to travellers.

(b) Most summer staff work as travel counsellors for only one or two seasons. This means that training of staff is required each year and that there are less opportunities for new staff to learn from the experiences of seasoned counsellors.

(c) Developing a good working level of regional tourism knowledge requires much more effort on the part of the TIC management and the travel counsellors than developing the required level of local knowledge.

These problems emphasize the importance of making a comprehensive training program available for the travel counsellors at all centres. The Travel Counsellor's Techniques course (described in Section 3.1.9) forms a good base, but it must be supplemented by an on-site orientation and regional familiarization program. An outline of an in-house training program developed in 1983 by the Ministry of Tourism and the Prince Rupert Tourist Bureau will be available through the Chambers of Commerce. This program includes:

a) introduction to the Chamber of Commerce
b) office orientation
c) telephone techniques (local procedures)
d) forms used
e) complaint handling procedures
f) familiarization tour of the town and of regional attractions
g) sales techniques and selling aids available.

7.1.4 Community Support

During our fieldwork, it became obvious that some local TICs do not feel that they receive enough support from the community. Support from the tourist oriented businesses is generally satisfactory. However it is not clear that the community as a whole recognizes the value, impacts and benefits of local tourism. At the local government level, financial support can vary from year to year depending on the perspective of the elected officials as well as on the financial position of the community. Even at the Chamber of Commerce level, instances were noted where emphasis was being shifted away from tourism (and suport for the local TIC) towards economic development activities. These problems can result in funding shortfalls and emphasize the need to educate the community about the values of tourism and the activities of the TIC.

7.2 Problems with the Tourist Information Centre System

7.2.1 Plan for Growth

The system of TICs in BC has developed largely as a result of local initiative and interest in tourism. The local centres exist primarily to increase the awareness of local tourism features, to provide a display area for local tourist operators' brochures, to provide information to tourists in the hope that they will enjoy the local community, and to encourage longer stays in the local area. There has been no use of a master plan for centre development. This tends to cause a duplication of services in some locations. E.g.

- the Greater Vancouver Convention and Visitors Bureau is located within 4 blocks of BC's Robson Square location;
- Dawson Creek's local centre and BC's Dawson Creek location are now located in the same building, but only 9 miles away is another local centre in Pouce Coupe;
- Osoyoos' local centre is located within 4 blocks of BC's Osoyoos location;
- Golden and District's Chamber of Commerce TIC is located in Golden while there is a provincially run TIC located on the outskirts of town.

While not a serious problem in BC, the lack of a plan can also leave some areas without the appropriate level of tourist information service. In BC, the major tourist routes and destination areas are reasonably well covered, but some TICs are located in towns when they would be more suitably placed at a major highway junction or at a decision point for typical tourists. The lack of an overall plan has allowed a major focus to develop in existing tourist areas. These TICs cater to a captive tourist market and create mainly local benefits. This has placed more pressure on the provincially operated border located centres to distribute the tourist flows. There is a need to stress a more regional promotional approach at TICs which cater to on-route tourist traffic. These TICs are in a position to assist the tourist

distribution on a regional basis and should downplay their natural parochial tendencies.

7.2.2 Control of Service

At the present time, there is no coordinating or managing body which ties all the centre operations together. The Ministry of Tourism operates 10 high profile centres, but the local centres operate in a generally cooperative but autonomous manner. There is no mechanism to control the quality of service, the staffing of TICs, and the level of staff training. Despite the influence which the Ministry carries regarding the allocation of provincial wage subsidies for travel counsellors, these funds are administered by the Ministry of Labour. These funds are not granted on the basis of meeting some set of facility or service standards or on the basis of volume or financial need. Control and guidance have been provided to a very informal extent by the managers of the Regional Tourist Association and also by the BC Chamber of Commerce. The RTAs do not have a mandate to perform the role and have neither the money nor the manpower to take an active part in the TIC network program.

To date, there has been no standardized plan for centre design or content, and no operation guidelines for organizations considering starting a TIC. Without functional standards, there is little that the Ministry can do to prevent a shop owner from displaying a tourist information sign in an effort to increase the tourist flow into his business establishment. In small communities, this may be an ideal solution, if the operator is willing to provide a bonafide impartial and accurate information service. However, if the effort is less than sincere, the staff not properly trained, and the information poorly displayed, the impact on the tourist and on the credibility of the entire TIC system will be negative.

The coordination of the TIC efforts is very important when

attempting to prepare for major tourist promotions or events (e.g., Expo 86). There is a need to promote communication and understanding from the provincial representatives down to the local travel counsellors. There is also a need for documentation of tourist inquiry levels at centres throughout the province. This level of coordination and cooperation is needed to allow mobilization of local efforts in support of a chosen master plan.

7.2.3 Other Issues

Funding is an important consideration at the system level because the current economic environment has restricted the availability of financial resources. The development of new provincially run centres is likely to take a longer term focus. The funding that is currently available for local centres is not expected to increase in the immediate future, so if more centres apply for funding, less money will be available to assist each applicant. Of particular concern is the $70,000 which as been used to fund operating grants for local centres. At the current level of $500 to $1000 per centre, this assistance represents a small contribution to budgets which tend to exceed $10,000. Some centres use this money to help pay the costs of sending counsellors to the Travel Counsellor's Techniques course. Consideration should be given to investing the available funds in avenues which will produce permanent facility or service improvement at the local level.

Public awareness of the service provided by Tourist Information Centres could be improved. BC residents still account for the majority of person-trips in the province; however, these tourists use TICs to a relatively low extent.

The travelling public should also be made aware of the services available at the TICs. To a minor degree, competition exists from hotels and other hospitality businesses displaying brochures. These businesses are not

staffed to provide accurate and impartial information.

Some of the tourists interviewed indicated the need for a better explanation of the "?" sign. It is not an international symbol and does not immediately denote the approach of a TIC to all tourists.

7.3 Benefit-Cost Analysis

Appendix D (Volume II) details a methodology that can be used to evaluate the net economic benefits of a given tourist information centre or set of centres. The methodology is consistent with generally accepted benefit-cost practices. It attempts to access the amount of income that is generated for BC residents (or lost by BC residents) as a result of the operation of TICs.

The following is a simplified explanation of the methodology:

(a) Each TIC handles a proportion of tourist inquiries that result in expenditures in BC which would not have occurred without the TIC's information. Some tourists are influenced to visit more attractions than they otherwise would have visited and, in some cases, the tourists are influenced to increase the duration of their stay in BC.

(b) A proportion of these increased tourist expenditures results in increased income for BC residents. This amount is calculated by subtracting from the additional tourism revenues (as outlined in (a)), the costs of materials, equipment, services, and labour required to operate the affected tourist businesses. This net increase in income is referred to as "net economic benefits" below.

(c) Once an estimate of the net economic benefits is determined (as outlined in (b)), this can be compared to the cost of operating the TIC involved.

The benefit-cost calculations are illustrated in Table 7.3 for four hypothetical examples of TICs. These figures are not taken from the operating statements of any specific centres and actual costs will vary from centre to centre depending on the local economic conditions. The important figures to note are the net economic benefits and the economic costs of operating a centre (before capital cost allowance). In Table 7.3, the rounded figures are:

Annual party inquiries (measure of size)	3,000	10,000	50,000	100,000
Net Economic Benefits to the Province	$5,500	$18,000	$91,000	$183,000
Net Economic Operating Costs of TIC	8,500	17,000	56,000	36,000
	<$3,000>	$ 1,000	$35,000	$ 97,000

While the actual magnitude of the figures and the details of the methodology are most relevant to economists, the major conclusion is that there are small volume centres which may be viewed as uneconomical. I.e., BC residents as a whole lose more income than they gain as a result of the existence and operation of the centre. Even the TIC handling 10,000 enquiries per year in the example makes little economic contribution to the capital cost of the facilities.

It should be emphasized that this methodology is based on a number of assumptions which has some inherent biases. An attempt has been made to provide a best estimate of the key factors involved and a conservative approach has been taken when dealing with uncertainty. The results of this analysis should be applied with care and only by individuals who have thoroughly read and understood Appendix D (Volume II).

TABLE 7.3: EVALUATING THE EFFECTIVENESS OF FOUR HYPOTHETICAL INFORMATION CENTRES FROM THE PROVINCIAL PERSPECTIVE

	A	B	C	D
Characteristics of Each Centre				
1. Total Personal Enquiries in a Year	3,000	10,000	50,000	100,000
2. Annual Operating Budget ($)	10,000	20,000	65,000	100,000
3. Capital Cost ($)	20,000	50,000	150,000	225,000
Calculation of B/C Ratio				
4. Tourist Parties Influenced				
- Additional Day	210	700	3,500	7,000
- Added Attractions	690	2,300	11,500	23,000
Total	900	3,000	15,000	30,000
5. Tourists Influenced				
- Additional Day	525	1,750	8,750	17,500
- Added Attractions	1,725	5,750	28,750	57,500
Total	2,250	7,500	37,500	75,000
6. Additional Tourism Expenditures ($)				
- Additional Day	18,400	61,300	306,300	612,500
- Added Attractions	12,075	40,250	201,250	402,500
Total	30,475	101,550	507,550	1,015,000
7. Net Tourism Benefits ($)	6,090	20,310	101,510	203,000
8. Net Economic Benefits ($)	5,490	18,270	91,360	182,700
9. Economic Costs of Centres ($)				
- Operating	8,600	17,200	55,900	86,000
- Annual Capital Charge	3,330	8,330	25,000	37,500
Total	11,930	25,530	80,900	123,500
10. Benefit/Cost Ratios	0.46	0.72	1.13	1.48

Notes and Assumptions

1., 2. & 3. are hypothetical examples which are representative of different types of centres covered in the survey.
4. 30 of 100 visitors to information centres are influenced in some way. Of these, 7 extend their stay by one day and 23 add attractions
5. Average party size of 2.5 persons.
6. $35.00 per person per day for visitors who stay an extra day; $7.00 per person per day for visitors who add attractions.
7. 20% of additional tourism expenditures.
8. 90% of net tourism benefits.
9. "Economic" operating costs equal 86% of annual operating budget; the annual capital charge equals one-sixth of capital costs.
10. Net economic benefits (8.) divided by the economic costs of the centre (9.).

The following two comments should be considered when using the results of the benefit-cost analysis:

(a) The methodology may tend to understate the benefits of TIC activities because it does not include the effects of increased tourist expenditures resulting from repeat visitations and positive word of mouth advertising.

(b) The methodology is based on the perspective of the BC society as a whole (i.e., it incorporates the income gains and losses for all BC residents as a result of TICs). This is appropriate for the current purpose. However, it may not be an appropriate perspective when an information centre is being evaluated by a community. The local organization would likely be more interested in the income gains and losses for residents of the area only. The net income generated for a local area would be higher than the net income generated for all of BC. This is due to tourists increasing expenditures locally at the expense of moneys that would otherwise be spent in other BC communities.

Despite these qualifications, this benefit-cost analysis can be a useful technique for evaluating the effectiveness of tourist information centres. However, this approach should always be used in conjunction with other measures of effectiveness. Drawing on our benefit-cost analysis as presented in Appendix D (Volume II), the following conclusions can be made:

(a) Small centres with less than 7,000 personal tourist party inquiries per year will typically not be economically viable.

(b) Centres serving in excess of 30,000 tourist party inquiries are generally economically attractive as long as the capital costs are low.

(c) In general, the economic viability of a centre can be questioned when the operating budget exceeds total personal tourist party inquiries by a factor of two or more.

(d) A new centre can be justified from a provincial perspective only if there is clear evidence that it will not significantly reduce visitations at existing centres.

(e) It is likely that there are a number of situations in the current BC system where it would be desirable, in economic terms, to amalgamate two or more centres into one larger facility serving a larger area. Amalgamation would be particularly attractive in cases where a region has a comparatively large number of small volume centres. However, each situation would need to be analyzed separately using the methodology described in Appendix D (Volume II). A hypothetical example which is illustrative of this situation is assessed in Appendix D.

(f) The results of applying the methodology to measure the effectiveness of the total system (Appendix D) suggests that the current system of TICs is generating economic benefits which cover the system's economic costs. However, it is operating very close to the margin and there is room for improvement. The economic performance of the system could be dominated by the favorable performances of a small number of large-volume centres.

7.4 Basic Options for the TIC Program

This section presents a discussion of four options for the development of BC's TIC system. In all cases, the options are considered from a provincial perspective and reflect the findings of our research. The best choice uses elements of more than one option.

Option 1: Privatize the current provincially operated centres and focus informational efforts and financial resources on encouraging tourists to holiday in BC (both residents and non-residents).

The advantages of this option are:

(a) There would be major savings in program funding which could be directed towards other tourist marketing efforts.

(b) This approach would also be consistent with the provincial government's policy of privatization where feasible.

(c) There would be a reduction in duplication of services as at least four of the BC centres would likely be consolidated with the local centres located nearby.

The disadvantages of this option are:

(a) There would be a reduction in the number of centres attempting to spread the tourists around BC resulting in:
- less general promotion taking place (and more localized promotion) and possibly the development of a lower level of awareness in interior BC tourism features
- less spreading of tourism benefits
- potential increased crowding of border and popular tourist areas.

(b) There would be less control of the quality of service provided to tourists and there would be an absence of standards for the local TICs to emulate.

(c) There would likely be a minor decrease in the number of summer jobs available.

(d) There would be a loss of a lever for implementing BC's tourism strategy.

(e) There would be less direct contact with tourists and this would likely foster a loss of touch with tourists' needs and attitudes.

(f) Depending upon the degree of funding cutbacks (i.e., if the travel counsellor wage subsidy program was also withdrawn) some local centres might be expected to close. This would cause:

- loss in coverage of tourist routes and areas, and a reduction in tourist service
- a concentration of TICs in relatively affluent tourist oriented communities (and destination areas) and a reduction of on-route TICs
- greater pressure to be placed on private businesses to handle tourist inquiries.

Option 2: Support only the BC Centres.

The advantages of this option would be:

(a) Administration would be easier because there would be no funding programs to monitor.

(b) Program funds would be directed towards the centres which (generally) handle the largest volume of tourists.

(c) Program funds would be directed towards non-resident tourists who tend to take longer trips, use a higher budget, and have a greater potential of having their plans influenced to the province's benefit.

(d) It would encourage a weeding out of TICs which are not strongly supported by local tourist businesses, do not serve a reasonable volume of tourists, and do not provide a serious tourist service.

The disadvantages are:

(a) Those related to funding cutbacks as expressed under (f) in Option 1.

(b) There would likely be pressure on the TICs to justify their existence which would result in more emphasis on overt selling, commercialism and parochialism.

(c) The reduction in the number of centres would result in the loss of summer jobs.

Option 3: Consolidation of the Current System

This option would involve maintaining the current number of BC centres and consolidating the low volume local centres into larger centres. The result may be a reduction of 20-30% in the total number of manned local centres. (Some low volume locations could be considered for replacement by a highway pull-off located, unmanned centre).

The advantages of this option are:

(a) There would be less duplication of service resulting in a more efficient coverage of the tourist areas of BC.

(b) With the number of low volume centres significantly reduced, there would be a better allocation of scarce resources (i.e., government wage subsidies).

(c) Program funds would be focussed on larger centres which would be better able to provide the quality and range of service needed for the future and to utilize computer applications.

(d) The system would be easier to manage and there would be a better opportunity to develop good working relationships between staff of different centres.

(e) Consolidation efforts would:
- encourage regional cooperation and increase the area represented by the centres involved
- provide an opportunity to place the TIC at the key location for tourist service and regional promotion
- provide an opportunity to apply a more standardized approach to facilities and layout design
- encourage development of more full-service, "one stop" centres which would be capable of providing all the information a tourist requires for his trip.

The disadvantages of this option are:

(a) With fewer centres, there is the potential of causing:
- a poorer coverage of local areas
- less convenient access for tourists
- a decrease in the number of summer jobs.

(b) There would tend to be an underutilization of buildings as small centre facilities are vacated in favour of larger format TICs.

(c) With the lack of a governing body in conjunction with a large number of autonomously operated TICs, implementing a consolidation strategy would be difficult and likely cause antagonistic feelings to develop. (Note: most of the local projects involve contributed labour and materials and have a built-in commitment which would make it difficult to accept a government decision to consolidate.)

Option 4: Building on the Current System

This option would accept the present system as it is and plan for limited growth in the future.

The advantages of this option are:

(a) There would be a maintenance of system continuity which is supported by the following findings:
   - the regional distribution and coverage offered by the current system appears to be quite comprehensive
   - the current system as a whole appears to be operating effectively.

(b) The findings of our report might encourage more communities to start TICs which would enhance the availability of service.

(c) If appropriately structured, an expanded (limited) program could result in a regional redistribution of tourism activity in favour of the presently disadvantaged parts of BC.

(d) The political visibility of the program would be enhanced and the government would be credited with expanding its efforts to support local and regional development.

(e) There would be a limited increase in the job creation benefits of the program.

The disadvantages of this option are:

(a) Maintenance of the present system does not address the problems of:
   - duplication of service
   - supporting inefficient, ineffective or uneconomic small volume centres

(b) Our cost-benefit analysis indicates that the current TIC system is operating very close to the margin. Maintaining the current system while allowing for growth (limited) could significantly reduce the overall viability of the system.

(c) As the system grows, it will become even more difficult to coordinate and monitor.

(d) With the near-term budget frozen for the operating grant support program and for the wage subsidy program, there will be less money available per centre as growth occurs. The possibility also exists for a future phase-out of the federal wage subsidy program. This would place further pressure on the provincial funding resources and place pressure on local TICs to become self-sufficient.

No matter which option or combination thereof is chosen, it must in no way act to deter local initiative towards tourism. Our research indicates that the managers (or sponsoring organizations) for several local TICs already believe that the level of provincial support is too low and that the contribution of tourist operators and the TICs in general provides a substantial boost for the province as a whole. Major cutbacks in the current level of centre support would be poorly received at the local level and would likely be viewed as an indication of the government's intention to reduce its commitment to tourism development.

8.0 RECOMMENDATIONS

8.1 Objectives and Goals

We recommend that the main objectives for all the TICs in the current program be retained. They are:

(a) To enhance the quality of the visitor's experience, which can be achieved by:
- providing a friendly atmosphere
- providing helpful and accurate information pertaining to the visitor's request
- conveying interest in the visitor
- conveying enthusiasm for the job of travel counselling.

(b) To increase the amount of money spent in BC by visitors which can be achieved by:
- providing a reason for visitors to increase their duration of stay
- making visitors aware of additional attractions or events which can be fitted into their travel itinerary.

(c) To encourage visitors to make return trips to BC which can be achieved by:
- providing more items to see or do than the visitors can accommodate in their schedule
- introducing holiday ideas or activities which make the off-season appealing.

These objectives provide an important perspective and direction for both staff and management.

We recommend that the following two objectives be de-emphasized:
- to enable tourism to be carried out without environmental degradation

- to enable tourism to be carried out without an unnecessary level of inquiries being directed to other citizens.

Where applicable, these two objectives will be accomplished as a result of the existence and operation of the centres.

We also recommend that a TIC network be established which will provide assurance that a specific level of service and facilities is provided to tourists and which can be coordinated so as to achieve goals benefiting tourism and BC as a whole. This network should strive to achieve the following goals:

(a) develop an identity through the consistent use of signs, flags, and banners;

(b) increase the public awareness of the services available at TICs;

(c) monitor (and increase) the level of centre usage throughout BC;

(d) improve the quality of the facilities at TICs throughout BC;

(e) encourage the use of technological advances in information presentation;

(f) encourge the development of financially self-sufficient local TICs; and

(g) recognize that a cooperative, regional approach to promotion must co-exist with an enthusiasm for local features.

8.2 Strategy

8.2.1 Network Concept

Our recommended strategy combines aspects of options 3 and 4 described in section 7.4. This approach recognizes that the current system appears to provide adequate service throughout BC and, despite some individual and system shortcomings, is functioning reasonably well. Our approach takes the existing set of TICs and attempts to upgrade or improve their service by:

- establishing a network of TICs which is open to all existing provincial and local centres and which will coordinate and encourage the development of a high quality tourist information service;

- initiating a set of facility and service standards with which each member must comply; and

- providing the TICs with a practical manual which will guide existing operators and help potential sponsoring organizations assess whether a new centre is warranted.

The following advantages from options 3 and 4 are retained:

- continuity of the current system;
- regional cooperation will be improved by the nature of the network;
- standardization will be adopted through the use of rules, accreditation, and signage;
- services will generally be upgraded as a result of the standards and membership participation in the network;
- growth will tend to be encouraged in areas of need because of the use of an overall network plan;
- visibility of program and of government efforts will be increased.

The disadvantages of options 3 and 4 will be reduced as

follows:

- support for lower quality centres will be discontinued if the accreditation standards are not met;
- support of lower volume centres may be reduced if these centres cannot meet the required standards;
- support for areas with centres supplying duplicate or overlapping service will be reduced by a funding policy which allocates a maximum amount of funds to each Tourist Region. (See section 8.2.3)

It is our recommendation that a modified version of the three-tiered concept used in England and Holland be adopted in BC. The new system should be composed of provincially operated centres, locally operated centres, and a coordinating committee.

The provincial centres should continue in their current role of covering the primary tourist entry points, promoting all regions of the province and distributing tourists throughout BC. The brochure display policy which restricts literature to the subject of routing, attractions and events of community interest should be retained. The level of information detail carried should reflect the typical tourist traffic needs at each location. Cooperation with local accredited centre organizations is important. The cooperation may involve operating a facility housing both the provincial and local information centres. If such arrangements are made, the identities of the two sponsors must be retained by clearly marking and separating the centres or counselling areas. This has been tried in Dawson Creek and contemplated in other locations. The major advantage is that the visitors can obtain all of their required information about BC and about the immediate area in one location. This reduces duplication of services and, through cooperation, may allow mutual staff reductions in the off-season without reducing the services available to visitors. Where separate provincial and accredited local facilities are retained, the provincial centre should mention

the location of local centres which are on the tourist's travel path. The provincial centres may also display an attractive presentation of aspects of the surrounding community (e.g., a photographic presentation of events or seasons). This is particularly valuable if there is no local TIC serving the community.

There is a need for centres which provide a regional emphasis on tourist information. The Regional Tourist Associations should continue their focus on promotional roles and specific local TICs (Local A centres) should be set up to handle the regional information requirements. Appropriately located and sized regional gateway centres would require a major capital investment in new centres, but this is not feasible in the near term. The best short-term solution is to encourage existing large centres which are located along major tourist entry routes to a region or near major tourist decision points, to expand their scope of operation. These Local A centres would perform the roles of:

- dispersing tourists throughout the region
- promoting their regional opportunities
- promoting their local opportunities.

These centres are typically higher volume TICs and would receive extra government funding support. They would be required to maintain a separate brochure display for the surrounding region(s) and their in-house training program would have to cover a wider geographic area. The manager of the appropriate RTA would be involved in the regional familiarization aspects of the training program. In the long-term, these centres may be encouraged to build new centres using the standardized design concepts.

The Local B centres would tend to be smaller volume centres or centres located in destination areas. Their operation and role would be the same as that currently performed by most local TICs (i.e., they would mainly promote local opportunities) and their benefits would largely be realized

by local businesses.

It is recommended that the coordinating committee be composed of six members and a chairman. The participants should include representatives from:

Ministry of Tourism (one of which is specifically involved in the Provincial TICs)	(2)
BC Chamber of Commerce	(1)
Regional Tourist Associations	(2)
Local TIC Organizations	(2)

This committee would represent all nine tourist regions and should draw members from not less than three tourist regions (i.e., the latter 4 representatives should be drawn from at least 3 regions). This committee would perform a major communications role for all parties in the TIC network (i.e., the RTAs, the Chambers of Commerce, local TICs, and the Ministry of Tourism). With regard to the network, the committee would:

- recommend to the Ministry the policy for admission standards and accreditation procedures
- recommend the reporting requirements and review network progress;
- review applications for new centres to be admitted to the network;
- recommend the direction for growth and development within the concepts of facility improvement and technological advancement;
- promote the network concept and encourage participation;
- recommend how available subsidy funds are to be spent;
- work towards making local TICs more financially self-sufficient in the long term.

We suggest that the Ministry provide secretarial services as the committee requires. These services are not expected to be extensive but, if needed, assistance could also be

provided by the BC Chamber of Commerce support staff. Monitoring of member compliance with the basic standards could be accomplished annually by the Ministry's field staff. The staff currently visits and reviews accommodation operators in conjunction with representation in the BC Accommodation Guide.

8.2.2 Standards for the Network

We recommend that the following minimum standards form the basis of the admission criteria for the Tourist Information Centre network.

(a) Service
- provide sufficient reception area to comfortably service visitors
- provide a bench or chairs inside or immediately outside the TIC
- provide adequate Reserved for Tourists parking space outside the TIC (not applicable for TICs catering primarily to foot traffic)
- maintain facilities in a clean and tidy manner.

(b) Information
- provide at least 2 brochure racks: one to display government brochures and/or regional information; one to display local commercial operations or attractions
- keep brochures stocked so that bare areas do not occur.

(c) Hours of Operation
- be open for at least:
  - 7 consecutive hours per day excluding lunch
  - 9 consecutive weeks
  - 6 days per week including Saturday and Sunday during the period from July 1 to August 31
  - post the hours of operation in a visible place on the building exterior or grounds

- individual consideration will be given to TICs which operate in locations where the summer period is not the peak tourist season.

(d) Training
- at least half of the travel counsellors must have attended the Travel Counsellor's Techniques course
- provide on-site or inhouse training which includes at least one day of area familiarization to consist of a trip and/or a film presentation.

(e) Record Keeping
- supply the Ministry of Tourism with a record of the number of inquiries serviced for each month the TIC is open.

(f) Signs
- each TIC must be advance marked by the standard Department of Highways approach sign along the major traffic route
- each TIC site must be marked by a sign which clearly identifies the site or building as a Tourist Information Centre. (Use of the standard format is suggested.)

Special additional requirements for Local A centres include:

Under "Information" -- provide at least 3 brochure racks: one to display government brochures and general regional literature; one to display promotional literature from the region at hand (or regions if the location is a major gateway to more than one region); and one to display local commercial operations or attractions.

Under "Training" -- all travel counsellors must have attended the Travel Counsellor's Techniques Course; provide on-site training which includes at least one day of area familiarization and at least one day of region

familiarization to be coordinated by the RTA manager.

All members of the BC TIC network would be eligible to receive the following benefits:

- standardized highway approach signs
- Tourism BC entrance banners (changed every year)
- all provincially produced promotional tourist brochures
- an official BC Tourism Tourist Information Centre emblem for door or window
- the Travel Counsellor wage subsidy program
- the facilities improvement assistance program
- a wall map of BC with the tourist regions and TICs marked on it
- copies of the limited production "Super Natural" wall posters
- a listing of the telephone numbers and addresses of all network TICs in the Tourism BC Accommodation Guide
- "Travel Information" badges for staff
- official BC pins
- a reference manual.

While the application procedure would be open to all TICs currently operating in BC, each should be required to describe the facility and service offered in 1983. The description should specifically include:

- the number of visitors (or inquiries) served by travel counsellors in 1983. This should be estimated to the nearest 500.
- the opening and closing date for 1983
- the hours of operation (by season if varied over year)
- the number of summer travel counsellors hired in 1983
- the number of full-time travel counsellors employed (if manager is included, note this)
- the expected dates of operation, hours of operation and number of students to be used in 1984.
- the facilities offered; e.g,
    - . number of parking spaces
    - . picnic tables

- square footage of reception area
- washrooms inside/outside
- number of brochure racks (type or size).

8.2.3 Funding

We recommend that the province of BC should continue to provide funding for summer travel counsellors, but:

(a) in order to qualify for the program, the local TIC must be an accredited member of the BC TIC network;

(b) the $500,000 which is currently available should be maintained and made available on a year-round basis;

(c) the coordinating committee should allocate the $500,000 among the 9 regions to determine how many counsellors should be sponsored from each region and to determine the maximum dollar subsidy available per counsellor;

(d) the coordinating committee should recommend a set of guidelines for the adjudication committee to use in making the actual allocation of subsization funds in response to applications from local TICs; and

(e) the decision regarding which applicant TICs receive wage subsidization should be announced prior to March 15.

It is recognized that the amount of funding available for the TIC program is not likely to be substantially increased in the immediate future. The current budget cannot, however, support the existing 134 local TIC sites (including satellites). For example, if each TIC was to receive wage subsidy funding for two travel counsellors (TC), the total cost would approach:

134 x 2 = 264 TCs
$3.95/hr x 40 hr/wk x 13 wks = $2,054/TC
246 x $2,054 = $542,256

Within the scope of the current $500,000 budget, it is likely that there will be more requests for staff funding than can be acccommodated. (It is recognized that some centres will operate for shorter periods of time and some will qualify for federal program funding; however most centres use more than two TCs.) We recommend that:

- an emphasis on self-sufficiency be encouraged;
- Local A centres receive staff funding preference over Local B centres or that key tourist route locations receive preference over destination locations;
- large volume centres receive preference over low volume centres, particularly where the low volume centres are considered to be uneconomic.

The limitation on the availability of wage subsidization is expected to encourage some long-term consolidation in the ranks of the existing centres. It is important to ensure support for key locations along major tourist routes. Some of these locations perform valuable tourist distribution roles and stimulate general provincial benefits, but may not have strong local organizational support.

We recommend that the current program, which provides operating grants of up to $1,000 to TICs, be discontinued. The amount of the operating grant does not make a significant contribution to the budget of most centres. We recommend that the $75,000 from this fund and an additional $50,000 from the Ministry's budget be combined to set up a facility enhancement program which would be available to BC TIC network members. The purpose of the program could change each year depending on the aspects of the network facilities which the coordinating committee wants to upgrade. While there are many possible applications, the following two should be considered for year one of the program:

- providing travel counsellors with attractive BC pins and TIC badges (each badge should state "Tourist Information" or "Welcome to BC" and name; all badges should have the Tourism BC or TIC Network logo on them);

- establishing an onsite (entrance or building) sign upgrade program which provides a dollar for dollar sharing of the cost of purchasing signs and flag hardware in the standardized format.

Signing is viewed as a major weakness in the local centres. This cost-sharing program will encourage standardization (and the development of an identity) and will improve centre visibility. It is hoped that these upgrades will help to increase centre usage as well. Other applications of a dollar for dollar cost sharing program could be:

- to encourage the purchase of video cassette recorder/players to enable high quality audio-video presentation of local or regional attractions;

- to encourage the purchase of micro-computers or other information handling hardware which could be used by travel counsellors to provide a better information service;

- to develop computer software for use in computerized TIC applications; and

- to provide architectural or interior design consulting for those centres working to substantially upgrade their building.

This facilities enhancement program would be set up for use on a year-by-year basis so long as the need for facility development continues to exist.

8.2.4 Promotion of the TIC Network

To develop a professional image, the new BC TIC network should have a specific logo created. This could appear on the accreditation sign of all TICs and on all references to TICs. We recommend that increased public awareness of the TIC network be achieved through use of the BC Accommodation Guide. In the first section of the Guide there should be:

- an explanation of the "?" signs;
- an outline of the service aspects of the accredited TICs; and
- a list of all accredited TICs with their addresses and phone numbers.

The TIC logo should also appear in this section. Each TIC should also be listed in the service section before each town's detailed accommodation listing.

The BC TIC Network should consider having cards printed which can be displayed in the lobby of accommodation operators, directing tourists to the nearest TIC.

While the major government publications (e.g., the BC road map and the BC Accommodation Guide) are considered to be high quality publications by centre staff, some inaccuracies do appear from time to time. These can be embarrassing for local TIC staff. It is important to provide an opportunity for local input to these publications. We recommend that the managers of the RTAs be given an opportunity to review for potential content ommissions or inaccuracies prior to major revisions to or reprinting of these publications.

8.2.5 Network Plan for the Future

As a result of our research, we have concluded that there are too many local TICs to justify a significant level of provincial financial support at each location. Some centres are situated relatively close to other centres and, even if they are well presented, both centres are not likely to make

a major contribution to provincial tourism. As more centres join the current system, the proliferation of small-volume centres and satellite centres tends to produce benefits for the local rather than regional community.

Under the current system of TICs, there are few areas of the province which are inadequately served. In an effort to develop a model plan for TIC coverage of the province, the following factors were considered:

- important entry points to BC (based on volumes of non-resident tourists from the Visitors '79 survey, see Figure 8.1);
- major tourist traffic patterns throughout BC which indicated areas of volume (based on volumes of non-resident tourists from the Visitors '79 survey);
- locations in each region which were considered to be key by the RTA managers;
- major destination areas in BC;
- the length of primary tourist corridors.

Table 8.1 lists our recommendation for a substantially reduced number of TICs which would still provide a reasonable coverage of BC. The recommended locations are not intended to discount the successful efforts of some TICs which may not be listed. (Inquiry volume data on all TICs were not available, but the presence of a high-volume centre clearly indicates that a tourist need is being served.) The locations mentioned may not be currently serviced or may be serviced by multiple centres. Table 8.2 compares the current number of locations in each region (excluding satellite locations) with our reduced system. Under the new allignment, a 44% reduction in the basic number of centres would be achieved. It is not practical to achieve the smaller system in the near term. The autonomous nature of the current centre system, the strong commitment of some TIC organizations, and their contribution to an enthusiasm for tourism restrict the reduction process. However, the proposed format does indicate areas where opportunities may exist for cooperative

FIGURE 8.1: TRAVEL ROUTES OF NON-RESIDENT VISITORS TO BC

Source: Visitors '79 - BC Visitors Travel Survey - 1979
(funded by TIDSA)

TABLE 8.1: LONG-RUN TRAVEL INFORMATION CENTRE LOCATIONS

Region	Key Points Based on Travel Paterns	Existing BC Centres	Additional Key Points from Interviews with RTAs	Destination Areas, Highway Junction, General Coverage	Total TICs per Region
A	Victoria Nanaimo Parksville Campbell River	Victoria	Comox-Courtenay Sidney	Duncan Port Hardy Qualicum Beach	10
B	Hope Delta-Richmond	Vancouver Douglas Vanc. Airport Abbotsford	Horseshoe Bay- W. Vancouver Port Coquitlam	Gibsons Agassiz Whistler 2 Lower Mainland	13
C	Princeton Penticton Kelowna Vernon	Osoyoos	Armstrong	Keremeos	7
D	Creston Grand Forks		-	Castlegar Nakusp Nelson	5
E	Salmon Arm Kamloops Cache Creek	Mt. Robson	Revelstoke	Clearwater Lytton	7
F	Williams Lake		-	100 Mile House Quesnel Bella Coola	4
G	Prince George New Hazelton		-	P. Rupert Terrace Stewart Burns Lake	6
H	Chetwynd	Dawson Creek	Dease Lake	Ft. Nelson Ft. St. John	5
I	Radium Cranbrook Elko-Sparwood	Yahk Golden		Ft. Steele Kimberley	7

TABLE 8.2: COMPARISON OF ACTUAL AND PROPOSED TRAVEL INFORMATION CENTRE LOCATIONS

Region	Actual No. of TICs (excluding Satellites)	Proposed Number of TICs	No. of Person/ Trips in 1982 (000s)	Ave. of Person/ Per Centre Based on Proposed Format (000s)
A	22	10	2,310	231
B	29	13	3,460	266
C	8	7	1,470	210
D	10	5	550	110
E	12	7	1,275	182
F	7	4	480	120
G	9	6	745	124
H	8	5	290	58
I	10	7	900	129
	115	64	11,480	

TABLE 8.3: TRAVEL INFORMATION CENTRE SITES WITH TOURIST DISTRIBUTION ROLES

Region	Local A	Region for Major Distribution Emphasis	BC Centres
A	Victoria GVVIC	A	Victoria
	Namaimo	A	
	Campbell River	A	
B	Hope	A, B, C, & E	Douglas Vanc. Airport Abbotsford
C	Princeton	A, C, & E	Osoyoos
	Vernon	C	
D	Grand Forks	D	
	Creston	D	
	Nakusp	D	
E	Cache Creek	E, F	Mt. Robson
	Revelstoke	E	
F	Williams Lake	F	
G	Prince George	G, F	
	Prince Rupert	G	
H	-		Dawson Creek
I	Radium	I	Golden
	Elko-Sparwood	I	Yahk

operations and where scrutiny is required if applications for new centres are received.

Of the 64 locations listed in Table 8.1, we suggest that 26 of them are special TICs because they are in sites which make them important for the distribution of visitors within the region or throughout BC. With the exclusion of the 10 BC operated centres, these special TICs will be called Local A centres and are referred to in Section 8.2.1. The special centre sites are shown in Table 8.3. Most of the Local A sites are not in destination areas. The benefits of their activities are potentially more regionally oriented.

Additional BC centres may not be needed in the near term, but if and when funds are available, consideration should be given to the following locations:

- Prince Rupert (a major entry point to the Yellowhead Region serving the tourist cruise ships)
- Radium or Elk-Sparwood (major entry point to Region I from Alberta)
- BC Ferries from Vancouver to Nanaimo and from Tsawwassen to Victoria (potential for an unmanned video display; these might, however, duplicate services available in Sidney and Nanaimo).

In the first two cases, a cooperative venture might be possible with the existing local TIC organizations.

8.3 Computer Applications

The primary considerations for computer use in tourist information centres have been covered in section 6.0. Our recommendations for BC's move into the use of computer technology in TICs is as follows:

(a) The Ministry of Tourism should not directly undertake the development of a computerized reservation service. This should be left to the private sector. If the need

arises for provision of a reservation service, at least one well-developed system currently exists (e.g., via Miller Computing Ltd.).

(b) The installation of computerized information services which are designed for direct use by the public should not be considered for the near term.

(c) Consideration should be given to the implementation of a computerized information system for use in BC operated TICs by travel counsellors. This type of system would:
- provide a means of increasing the productivity and effectiveness of the travel counsellors, particularly during periods of heavy traffic loads; and
- enable provincial officials to manage the marketing efforts of TICs.

(d) Our preliminary research surrounding the TIC system suggests that if computerization is determined to be a worthwhile investment, then communicating micro computers appear to be better suited to use in BC operated TICs than the stand-alone micro computers or than communicating terminals. Communicating micro computers would enable instant access to the reference data base. This system would also provide a communications capability for daily updating without the requirement for a dedicated telephone line and without the risks associated with potential communication disruptions. If a primary motive for developing such a system is to help handle the expected tourist volume associated with Expo 86, it is very important to allow sufficient lead time to design and implement the system. The on-site testing of the system should be scheduled for the summer of 1985. This will allow a performance assessment under summer volume conditions.

8.4 Preparation for Expo 86

Expo 86 management will prepare a special brochure for distribution through TICs in BC. The centres in the Lower Mainland and those within a two-hour auto-trip radius (including Vancouver Island) should be in a position to provide daily information on Expo events. This service could be facilitated in the BC run centres by the use of communicating micro computers.

There are expected to be problems for visitors attempting to find parking and accommodation. It is expected that TICs will receive a much higher than normal load of inquiries dealing with these topics. The occupancies in downtown Vancouver and throughout the Lower Mainland in general will be very high during Expo. Without a computerized reservations service or a daily vacancy reporting system, the TICs will be able to offer little in this regard other than directional aid. For the visitor, this may prove to be very frustrating and could create a poor impression (i.e., one of lack of preparation to deal with the tourist influx).

At this time, Expo management is not prepared to develop a reservation service. The current provincial tourism budget restrictions would suggest that the short duration of Expo coupled with a lack of evidence of need for a general reservation system do not warrant the major investment required. If an arrangement cannot be made with a private accommodation reservations supplier as suggested in Section 8.4, consideration should be given to the following example.

> In the summer of 1984, there will be a "Tall Ships" festival held in Quebec City. The Province of Quebec has arranged with Quebec Air Ltd. to provide reservation terminals at border crossings, key municipal information centres and provincial TICs. The terminals will use the Quebec Air computer to make flight and accommodation reservations. This service will be set up prior to the

festival and will be removed at the conclusion.

This type of arrangement is ideal because of the lack of a permanent commitment to the system and the lack of developmental costs involved.

The Expo site is expected to handle 80,000 visitors per day during the event. We recommend serious consideration of locating a large, temporary, portable or dismantleable format, BC operated centre across from the main entrance to the site. While the centres in the Lower Mainland (and Robson Square in particular) can be expected to have much heavier than normal request levels, a major need for visitors and a major opportunity for BC's promotion exists near the site. (There may be some restrictions concerning what material can be handed out on the Expo 86 site itself.)

The TICs in the Lower Mainland will need to perform a strong role in the distribution of visitors in order to spread the benefits of Expo and to reduce congestion in the Lower Mainland area. Part of this should involve a coordinated effort to develop a series of special tour packages (bus or simply auto routes for tourists) which are designed to combine days at Expo with days seeing other features of the province. Proper development of the marketing tools and management needed to prepare for and to distribute the Expo visitors is beyond the scope of this study.

The TICs should begin to promote Expo 86 in the summer of 1985. The Expo promotional program will be well underway and visitors may already be aware of the coming event. The subjects for promotion might include the concept of coming to Expo in 86 and seeing a different part of BC as part of the holiday. The key is to prepare or seed the minds of non-resident visitors with the idea of seeing more than Expo in 1986. A secondary consideration should be to remind potential Expo visitors that early accommodation reservations will be necessary.

8.5 Design Concepts

8.5.1 Entry Signage

The new TIC network needs a corporate identity. It is recommended that the network adopt a standardized signing system for use at TICs as well as an identifying logo. Although the logo and sign combination can be used effectively at most locations, the highway locations should be encouraged to adopt a specific, uniform entry format. This would improve recognition of the centre by highway users, and it would create a positive visual image of BC. We recommend that the entry signage system consist of:

- flag(s)
- tourism banners
- a prominent "Tourist Information" sign.

If one flag is used, it should be the British Columbia flag; if two are used, they should be the BC flag and the Canadian flag. The flags would help identify the location and provide an official image for the centres. A flag should be part of the signage regardless of the sponsor.

Banners would add interest and should symbolize some aspect of the Ministry of Tourism's promotional image. They should be both festive and colourful.

The sign should identify the facility as an information centre and should identify the sponsoring organization (in words). The sign should also display the network logo or the logo associated with the sponsor. For example, provincial centres could display the Ministry of Tourism logo and local centres could display the Regional Tourist Association logo. The sign should indicate whether the centre is open or closed (a detachable flap may be appropriate for this purpose) and what facilities are provided. Figure 8.2 illustrates the recommended entry signage and Figure 8.3 presents some specific guidelines.

FIGURE 8.2: ENTRY SIGNAGE

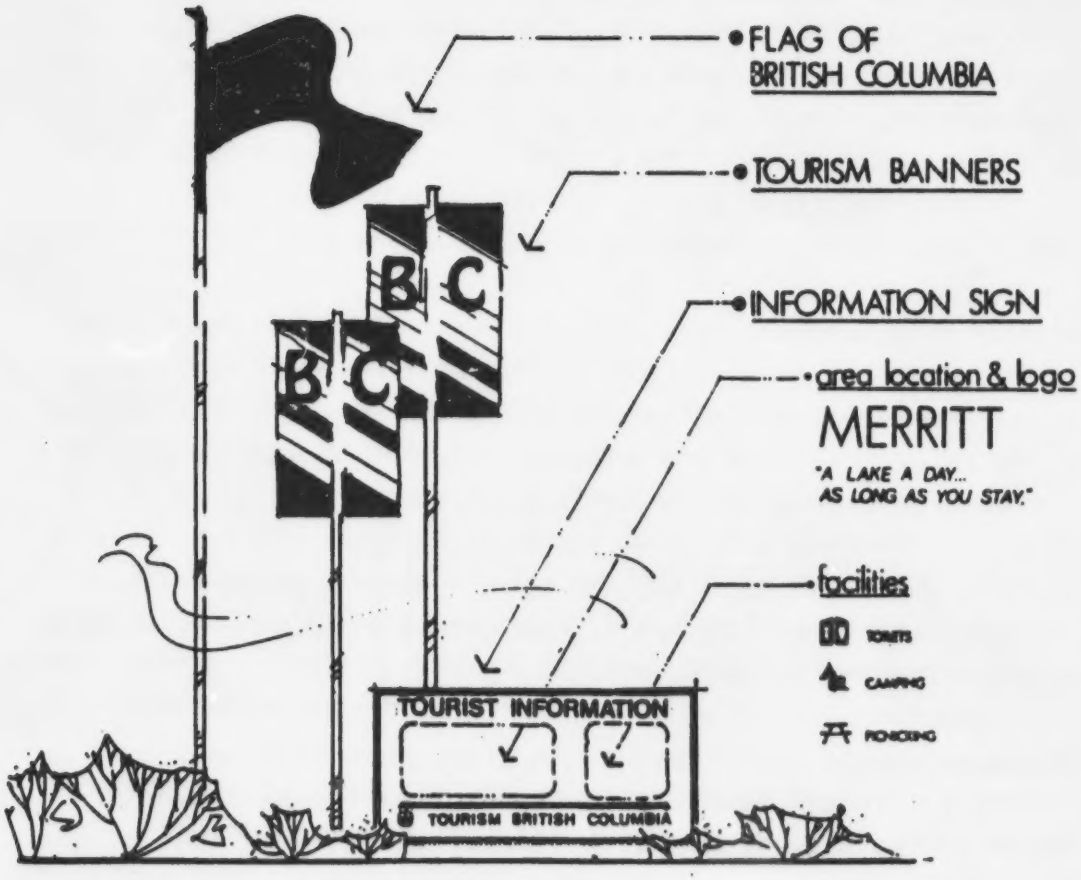


FIGURE 8.3: GUIDELINES FOR ENTRY SIGNAGE

FLAGS

An established size and quality of flag should be used at all information centres.

The flag should be flown on a standardized flagpole, which coordinates with the banner and information sign system.

BANNERS

At least four banners on two posts should be located at TICs. The design of the posts should be coordinated with that of the flagpole and information sign.

The banners can be changed to promote current province-wide or local activities, including festivals, carnivals, special events, summer/winter games, races, etc. Appropriate logos and seasonal graphics could also be used.

The banners should be designed to be eye-catching, colourful, and festive. A standard size and mounting system should be used that is suitable for all centres.

If the banners are located at TICs which will be open during hours of darkness, the banners should be well illuminated.

SIGNS

The sign should include the words, "Tourist Information".

The sign may incorporate the name of the area served by the information centre and the local symbol, logo, or descriptive saying, e.g., "City of Merritt ... a lake a day as long as you stay."

The sign should use international symbols to indicate the facilities available at the TIC.

The sign should follow the graphic formats for signage developed by the Ministry of Transport and Highways. The suggested size for on-site signs is 4 ft by 8 ft. The place names, logos, colours, and lettering styles of the Ministry of Tourism should be incorporated into the allotted space on the sign. Standardization of colours, lettering styles, and overall layout of graphics is important.

The sign must be clearly visible at night, illuminated by car lights as with standard highway reflective signs or by a light source.

8.5.2 Design Guidelines

All TICs should be easily identifiable to visitors. The TIC network's corporate identity can be enhanced by the use of standardized signage and a consistent approach to site layout and facility design. DPA Consulting in conjunction with The Eikos Group (landscape architects and planners) and John Kerrigan Sproule and Associates (architects) have prepared a series of interior and exterior design concepts which are appropriate for use at road side TIC locations.

The building design is based on the use of three materials which can be used to symbolize BC: wood, stone, and metal. Water should also be incorporated into the landscape where possible. The final design can be altered to suit a local interpretation.

e.g. stone - may be Squamish rock, BC jade or granite
metal - may be polished steel or chrome or prerusted steel
wood - may be cedar, pine, or fir.

The consistent use of a wooden structural "tree" is symbolic of BC's forests. If a "woodsy" image is inappropriate for the surroundings, the "tree" can be created from metal, resulting in an urban image.

When a new TIC is considered, the design should address the major needs of the sponsoring organization and should be of a size which reflects the expected visitor volume during the peak season. Some major size determining factors are:

- size of reception/display area (reflects the visitor handling capacity)
- number of travel counsellors working at the centre
- amount of on-site storage needed
- need for office space
- need for in-building washrooms.

We have developed loose guidelines only. The final choice of colours, lighting, layout, and application of design should be left up to the architect for each new centre.

8.5.3 Provincial/Regional Centre

This facility design may be used by BC Tourism or by a large local centre. Its size (1,600 sq ft) allows the handling of 20,000 to 50,000 inquiries during the summer. This corresponds to a summer peak inquiry rate of 250 to 600 inquiries per day. This TIC is designed to allow 3 to 5 travel counsellors to work at the centre at one time and will tend to be used on a year round basis.

The building program can be described as follows:

	Area (sq ft)
a) Visitor Area	
- proper signage - racks, including rotating and wall - display area for posters, topographical maps, etc. - local interest interpretive display and seating area for reading brochures	500
- washrooms (including handicap facilities) for men, women and staff; design should allow access from visitor area to enable staff to monitor usage	300
b) Work Space	
- counter space; provide easy access from storage area to behind counter; allow for adjustable shelves under counter	50
- work and stool area (behind counter)	150
c) Office Space	
- allow for desk, with typewriter run off, chair, file cabinet and 2 visitor chairs - office should allow supervisor to view visitor area - can be used as supervisor's office and/or interview room	100
d) Circulation and lost wall space	150

e) Storage Area, Staff Coffee Area & Mechanical

- allow for bulk supplies (floor storage) and metal shelving to support heavy items
- allow outside access for delivery of bulk literature; should have either a delivery ramp or a loading area (no stairs) 350

Total Interior Space 1600

f) Siting and Exterior

- Site area: one acre
- generous pull-off road and stopping area
- entry flags, sign and generous pull-on
- parking; allow for pull-through and single spots; 15-35 parking spaces with 50% oversized
- lighting, signage and vandalism protection
- signage, both onsite and highway
- display kiosk, suitably sheltered; preference given to a lockable display area which may eliminate vandalism and restrict the posting of unauthorized items
- service items to include sewer or septic, water, hydro, telephone, heat, air conditioning
- grounds landscape is significant, with small people area if possible
- facade of building should complement the area, keeping in mind the elements of the region (e.g., paint peels in intense heat or extreme cold)
- exterior telephone available to public
- exterior water fountain available to public

Figure 8.4 illustrates site layout for a new regional sized centre. Figures 8.5 and 8.6 illustrate the building design concept and the interior plan, respectively.

8.5.4 Local Centre

This facility design is based on 600 sq ft of area and is suitable for smaller provincial centres or medium sized local centres. It is designed to handle 8,000 to 20,000 inquiries during the summer season. This corresponds to a peak inquiry rate of 125 to 250 inquiries per day. This TIC is designed to allow 2 to 3 travel counsellors to work at the centre at one time and may be operated seasonally or year round.

FIGURE 8.4: PROVINCIAL/REGIONAL CENTRE: SITE

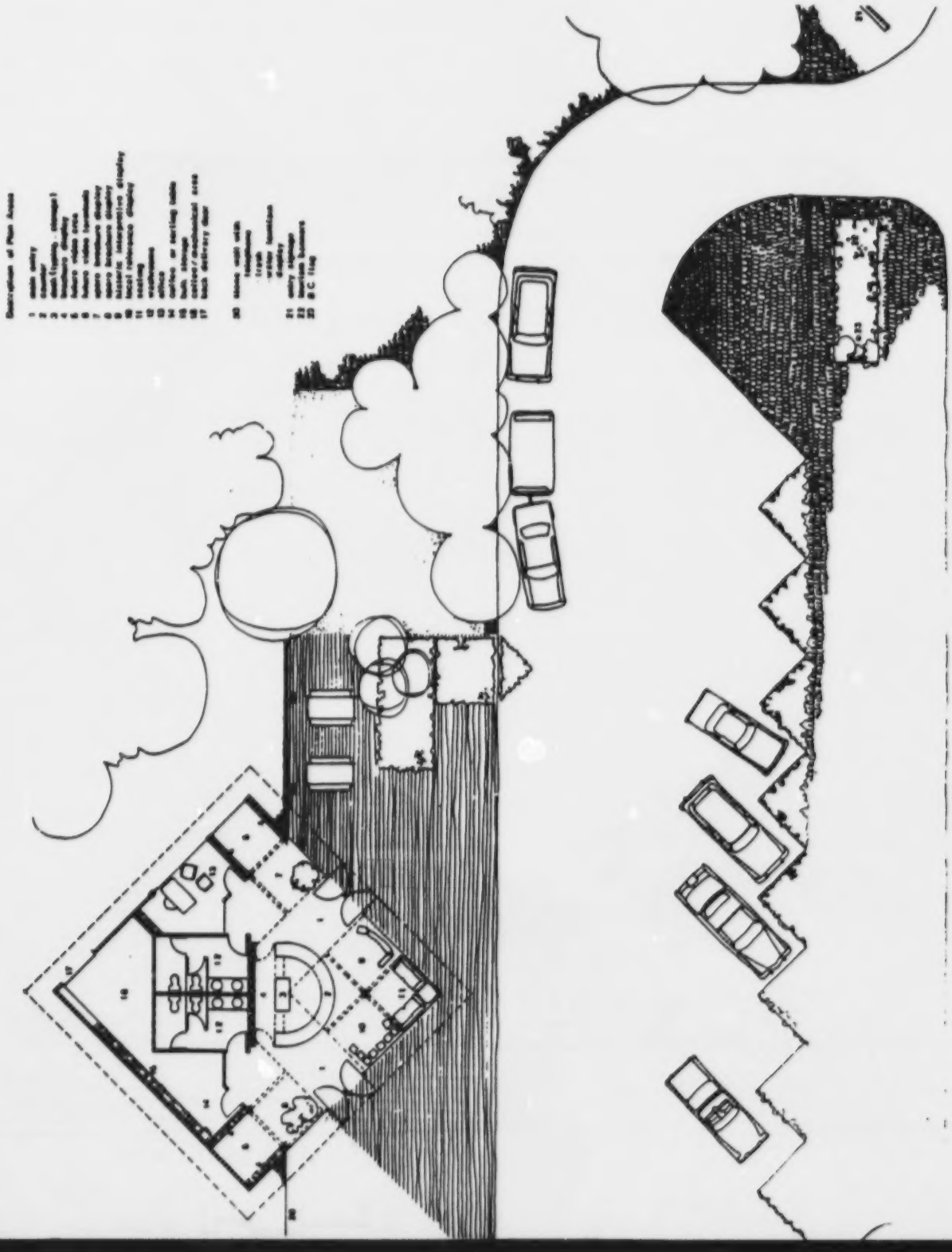
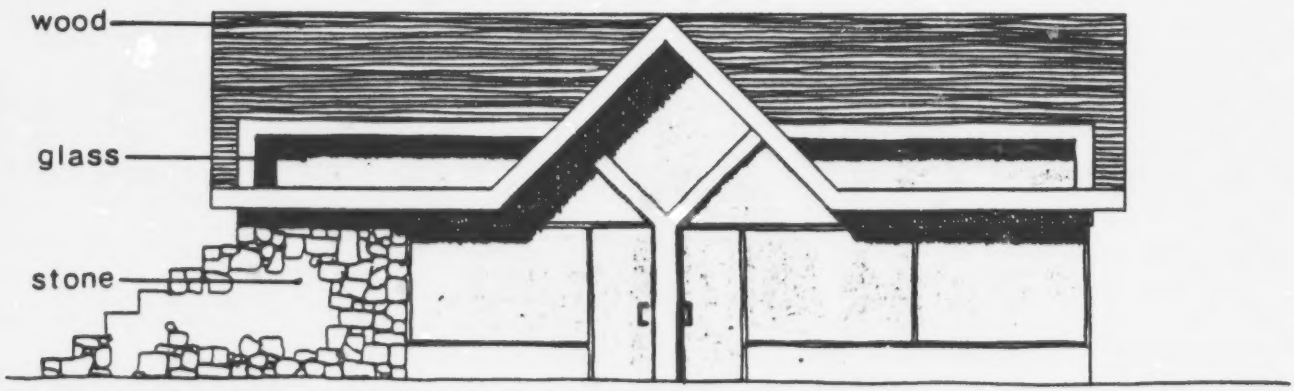
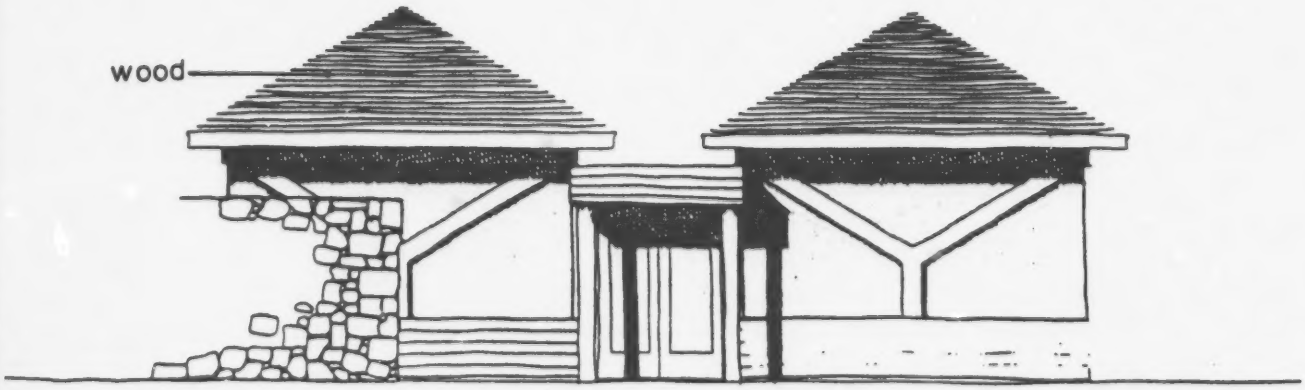


FIGURE 8.5: PROVINCIAL/REGIONAL CENTRE: DESIGN

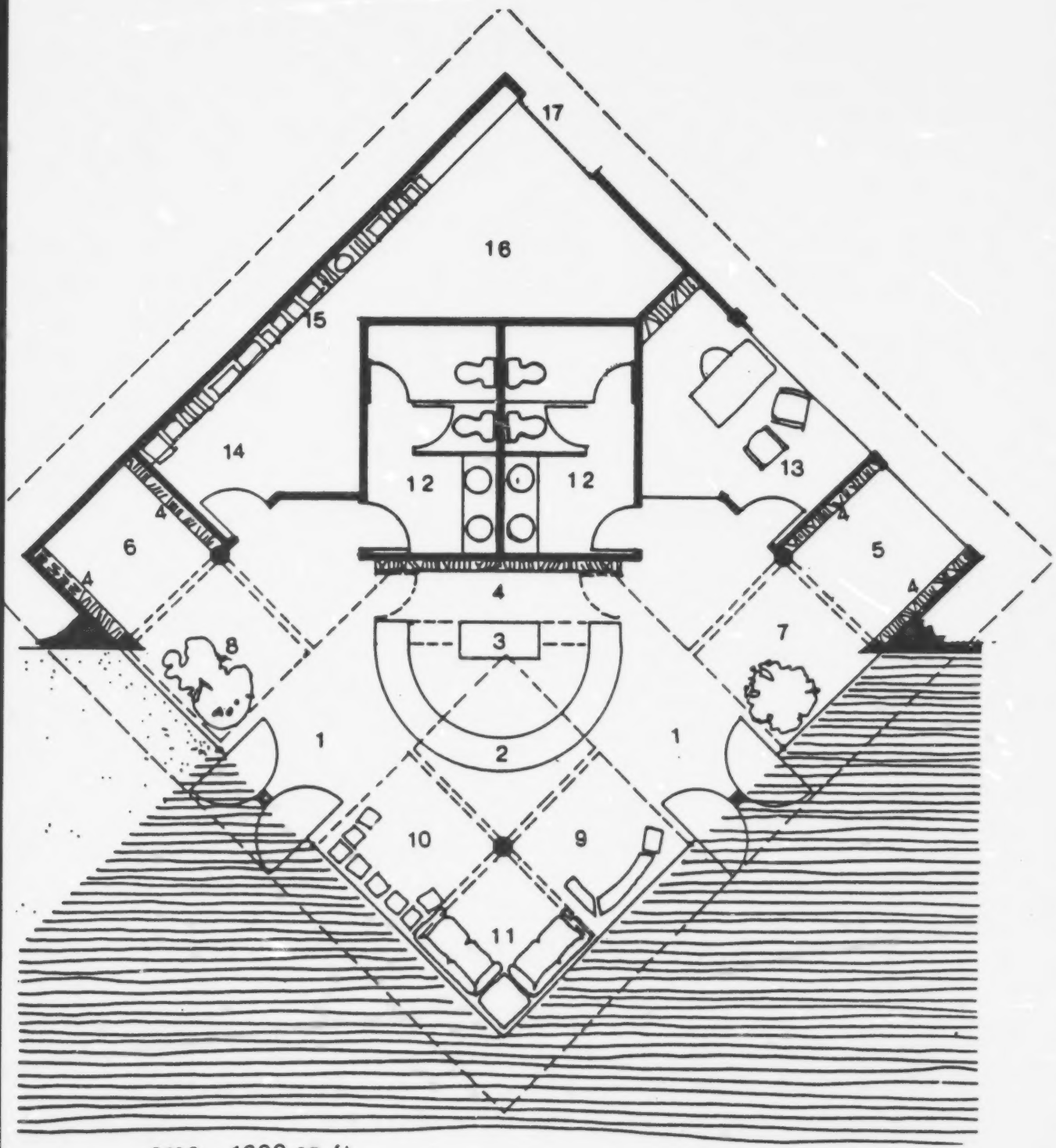


entry alternative



entry alternative

FIGURE 8.6: PROVINCIAL/REGIONAL CENTRE: PLAN



area: 1600 sq. ft.

scale: 0 1 3 6 10 ft.

The building program can be described as follows:

	Area (sq ft)
a) Visitor Area	270
- proper signage	
- display of brochures	
- display of posters and maps	
- local interest interpretive area	
- washrooms: two only, one with handicap access	
b) Work Space	
- counter space	20
- work area behind counter, including storage wall, chairs, and small office space	100
c) Circulation and lost wall space	60
d) Storage and Mechanical	150
Total Interior Space	600
e) Siting and Exterior	
- site area: 0.5 acres	
- parking: 10 to 15 spaces with 50% oversized	
- facility: telephone	
- signage, flags, landscaping and lighting to be the same as "Provincial/Regional Centre"	

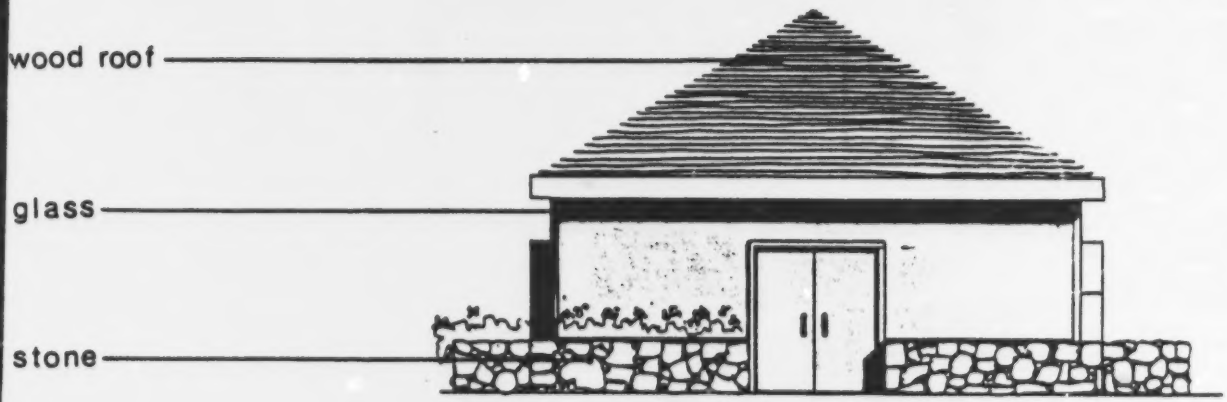
Figures 8.7 and 8.8 illustrate the building design concept and the interior plan, respectively, for a new local sized centre.

8.5.5 Unmanned Centre

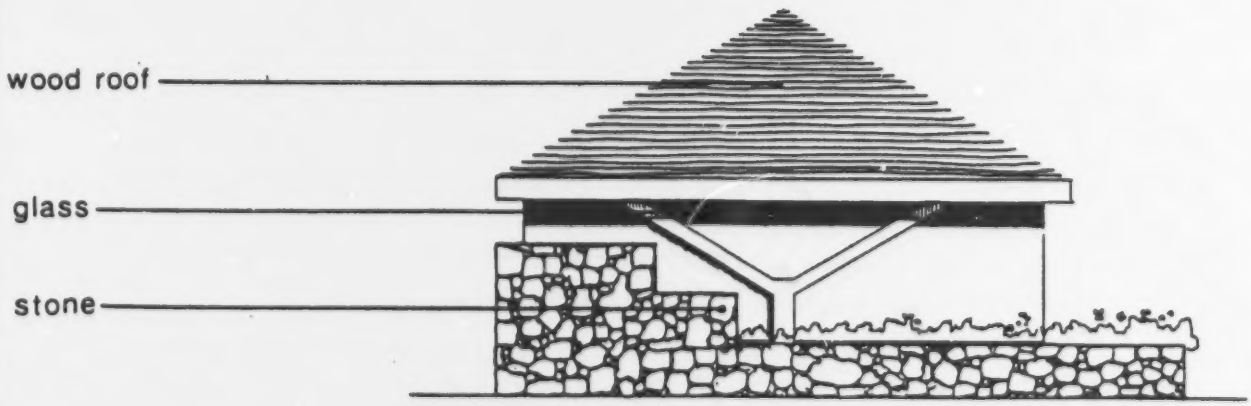
This facility is a low-cost alternative for the provision of tourist information and is most suitable for use in a highway pulloff location. The extent of capital investment would vary with the scope of the facility installed. A major benefit would be the low operating costs due to the lack of staff requirements.

The facility should provide a covered display area where visitors can stand (or use benches to rest) to examine the information displays which should be clear and self-explanatory. A primary display should involve one

FIGURE 8.7: LOCAL CENTRE: DESIGN

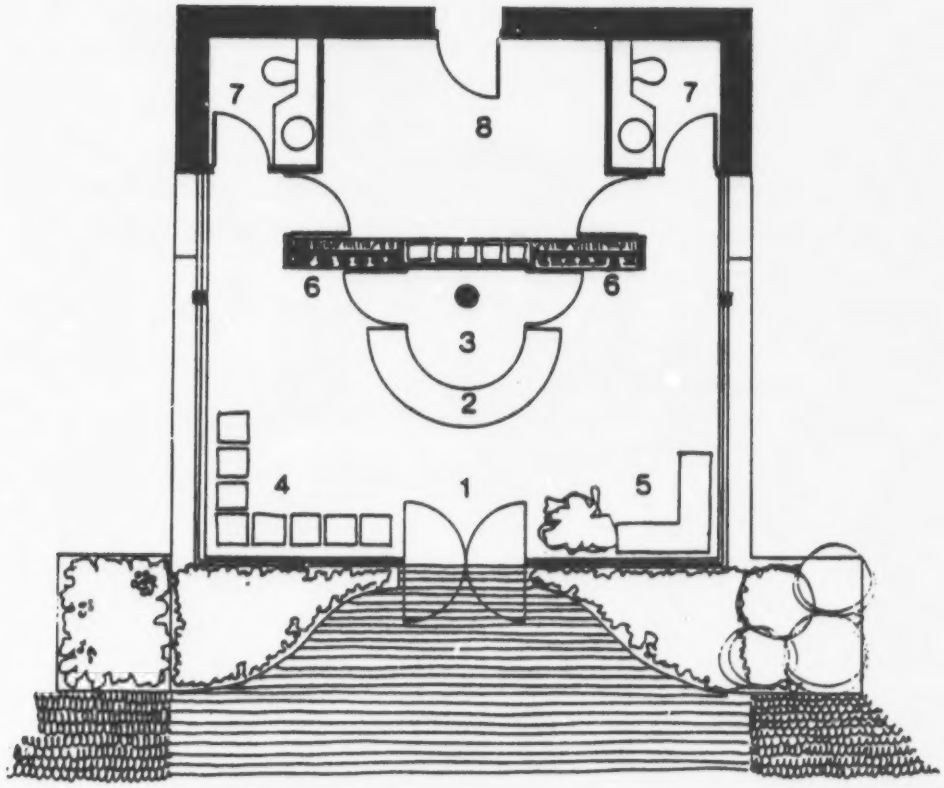


entry



side elevation

FIGURE 8.8: LOCAL CENTRE: PLAN



area: 600 sq. ft.

scale: 0 1 3 6 10 ft.

legend of use:

1 entry
2 reception
3 behind counter storage
4 local interest display
5 seating
6 brochure
7 washroom
8 storage and mechanical

or more large-scale, detailed wall maps which shows:

- the highway structure for a wide area around the site

- the street layout for the sponsoring communities

- the location of services available in the surrounding communities

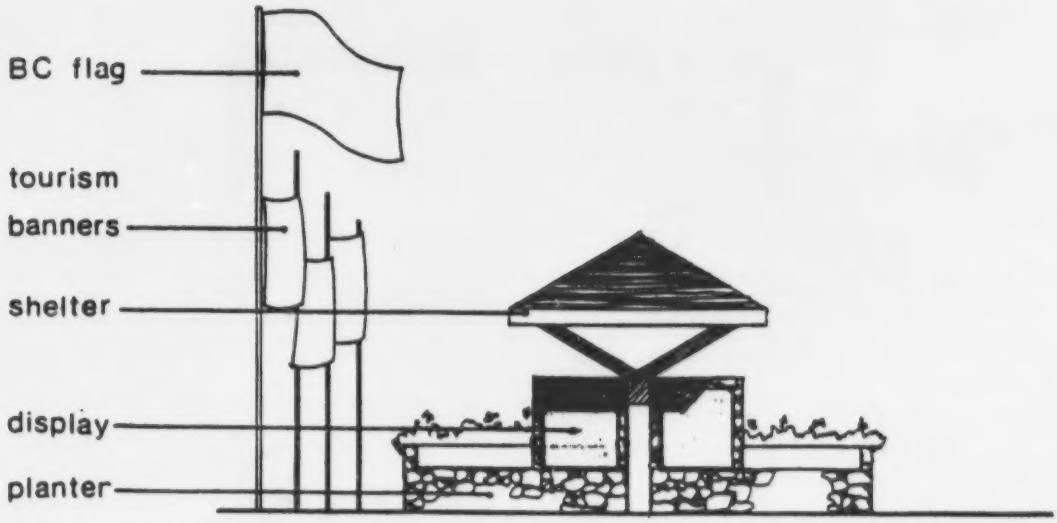
- the location of sponsoring tourist businesses, e.g.,
  - . hotels
  - . restaurants
  - . attractions

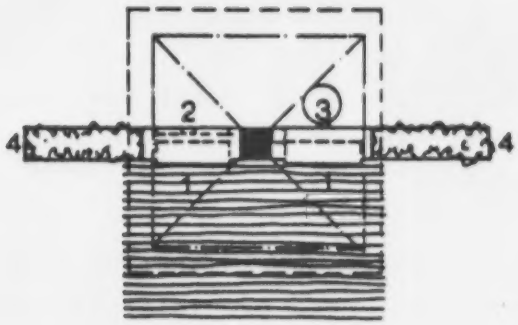
  (the names of these businesses should be listed by category on the side of the map.)

Brochures cannot be conveniently dispensed so it is important to make use of permanent displays which can convey similar information. Pictorial displays of attractions or a display of brochures behind glass can show the attractiveness of local tourist offerings even though the details inside the brochure cannot be effectively displayed in this manner. The structure used should allow for easy periodic changing of display items. The provision of a local bulletin board may also be helpful.

Each unmanned centre should include a pay telephone and a drinking fountain. The provision of washroom facilities is desirable, but they are costly and require constant maintenance. The structure and displays should be also be designed to avoid vandalism. If a Ministry of Highways site is used, the highways department will assist in the general upkeep of the grounds. Clearly, this type of facility is a passive information centre which is best suited to low-volume locations or to communities which have few tourist oriented businesses and very limited tourism development budgets. Figure 8.9 illustrates a suggested design for an unmanned centre.

FIGURE 8.9: UNMANNED CENTRE: DESIGN





area: as required

scale: 0 1 3 6 10

legend of facilities

1 display

2 telephone

3 water fountain

4 planter

8.5.6 Satellite Centre

This facility may be used as an extension of a major local centre or used on its own in smaller volume applications. Its size is small and it has a very restricted work and storage space. When it is operated as a satellite, the main centre would provide the storage and office space as required. This TIC would be used on a seasonal basis and is capable of handling 3,000 to 8,000 inquiries over the summer. This volume corresponds to a peak inquiry rate of 45 to 125 inquiries per day. The TIC is designed to be staffed by 1 or 2 travel counsellors at one time.

The building program can be described as follows:

	Area (sq ft)
a) Visitor Area	100
- proper signage - display of brochures - display of posters/map	
b) Work Space	
- counter space	20
- work area behind counter	30
c) Circulation and lost wall space	50
d) Storage and Mechanical	50
Total Interior Space	250

e) Siting and Exterior

- site area: largely up to the discretion of the sponsoring organization. (This centre is a low-cost structure and a minimum of land area is typically used. The actual size will often depend on the site available.)
- parking: 5 to 10 spaces with 50% oversized
- facility: telephone
- signage, flags and lighting similar to the "Local Centre".

8.5.7 New Centres

We recommend that the design concepts outlined above be used as a guide for all new network TIC buildings. The designs require polishing and testing in a working environment before the total concept can be put into common use. We suggest that a pilot project be established to coordinate all site components. The concept can be developed on a scale model basis or it can be applied to an actual location. If the latter approach is taken, the current BC-run centre in Abbotsford would be a logical site to apply the new 1,600 sq ft (provincial/regional) design format.

The design sizes were chosen to accommodate the various levels of tourist volume which exist throughout the province. The local sized (600 sq ft) centre design would be a logical replacement for BC operated centres which are currently housed in trailers. We do not recommend making structural changes to temporary facilities (i.e., putting a peaked roof on a trailer) because add-on techniques rarely improve appearance and do not maintain design continuity. However, if immediate upgrading is required in one of these centres, and the cost of building a permanent replacement is prohibitive, we recommend that the funds be used for maintenance, site improvement, and signage.

Canada – British Columbia

TIDSA

Travel Industry Development Subsidiary Agreement

Tourist Information Centre Study
1984

APPENDICES

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LIST OF APPENDICES

A. ORIGINAL RESEARCH REGARDING VISITORS TO TOURIST INFORMATION CENTRES IN BC

1.Ø Analysis of Visitor Questionnaire Returns

- 1.1 Introduction
- 1.2 Methodology
- 1.3 Sample
- 1.4 Biases
- 1.5 Findings
  - 1.5.1 The Total Sample
  - 1.5.2 Provincial Centres and Local Centres

2.Ø Visitor Interview Research
3.Ø Focus Group Research
4.Ø Other Personal Interviews Regarding TICs in BC

B. TOURIST INFORMATION CENTRE VISITOR TRENDS

1.Ø Introduction
2.Ø Steven Muha, "Who Uses Highway Welcome Centres"
3.Ø BC Research, "Visitors 79 - Parties Visiting and Not Visiting Information Centres"

C. MARKET TRENDS RELEVANT TO BC'S TOURIST INFORMATION CENTRES

1.Ø Introduction
2.Ø Information from the BC Tourism Plan
3.Ø Information from Other Documents
4.Ø Results from Consultations
5.Ø Implications for Information Centre Program

D. BENEFIT-COST METHODOLOGY AND GUIDELINES FOR EVALUATING THE TOURIST INFORMATION CENTRES IN BRITISH COLUMBIA

1.Ø Introduction
2.Ø General Approach
3.Ø Effectiveness of an Existing Centre
4.Ø Amalgamating Centres
5.Ø Assessing a New Centre
6.Ø Comparing Centres Across Regions
7.Ø Effectiveness of the Total BC System
8.Ø Sensitivity Tests
9.Ø Conclusions

E. PERSONAL CONTACTS MADE DURING THE STUDY

APPENDIX A

ORIGINAL RESEARCH REGARDING VISITORS TO TOURIST INFORMATION CENTRES IN BC

1.Ø Analysis of Visitor Questionnaire Returns

- 1.1 Introduction
- 1.2 Methodology
- 1.3 Sample
- 1.4 Biases
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APPENDIX A

ORIGINAL RESEARCH REGARDING VISITORS TO TOURIST INFORMATION CENTRES IN BC

1.Ø ANALYSIS OF VISITOR QUESTIONNAIRE RETURNS

1.1 Introduction

As part of our documentation of the present system of tourist information centres, we designed and administered a visitor questionnaire at 32 local centres, 12 satellite (local) centres, 1Ø provincially operated centres in BC, and one provincially operated centre outside BC (at Banff, Alberta).

The objectives of this data collection method were as follows:

(a) to provide a database which
- covered all tourist regions of the province
- included a large enough volume of tourists to allow the identification of subsector trends

(b) to provide a supplementary data source to the 83 personal tourist interviews which covered such subjects as:
- the type of information visitors want
- the degree to which visitors' information needs are satisfied
- the success of travel counsellors' selling efforts in terms of whether they induce visitors to add attractions to their agenda or lengthen their stay
- the importance of having centres available to visitors
- perceptions of the adequacy of the facilities

(c) to identify differences between local and BC operated centres and to identify regional differences.

1.2 Methodology

The questionnaire is shown on the following page. It was pretested at the Robson Square centre, then revised and pretested again.

Questionnaires were personally delivered to selected centres throughout the province. Questionnaires were also mailed to all BC operated centres which were not visited. The delivered package included a parcel of questionnaires, an instruction sheet, and a pre-stamped self-addressed envelope which was marked with the centre's code. The administration procedure was explained to the a travel counsellor or the centre manager. Although the questionnaires were to be administered over a specific 2-3 day period with no more than half the questionnaires to be completed on any one day, some centres required a week to get enough responses to make a worthwhile contribution.

FIGURE A.1: TOURIST QUESTIONNAIRE

1. Your residence: BC ___
   Other Canada ___
   Other Country ___

2. What information were you looking for?

   Accommodation ___
   Restaurants ___
   Directions ___
   Places to visit ___
   Special events ___
   Fishing, hunting or camping regulations ___
   Other _____

3. Did you get the information you needed? Yes ___
   Partly ___
   No ___

   What was missing? _____

4. As a result of your visit to the centre, are you likely to see and do more things than you would have otherwise? Yes ___
   Not sure ___
   No ___

5. What did you think of the staff?

Well dressed?	Yes ___	OK ___	No ___
Friendly?	Yes ___	OK ___	No ___
Knowledgeable?	Yes ___	OK ___	No ___

6. What changes should be made to the centre?

   No change ___
   Better road signs ___
   Better parking ___
   Improve outside looks ___
   Clean up inside ___
   Add public telephone ___
   Add public restroom ___
   Other _____

7. How important is it to have information centres available to you when you are travelling? Very important ___
   Nice to have ___
   Not important ___

8. **NON-BC RESIDENTS ONLY:**

   Did your visit to the centre make you decide to stay longer in BC than you had planned? No ___
   One extra day ___
   Two extra days ___
   More than two extra days ___

9. **BC RESIDENTS ONLY:**

   Did your visit to the centre make you decide to stay longer in this area than you had planned? No ___
   1-6 extra hours ___
   7-24 extra hours ___
   more than 24 extra hours ___

10. Other Comments? _____

In an effort to develop a sample which reflected the fact that some centres service a much larger volume of visitors than others, three size categories were selected:

Category	Description
A	More than 15,000 visitor inquiries per month (during a typical July) or more than 500 inquiries per day
B	6,000 to 15,000 inquiries per month or 200-500 inquiries per day
C	less than 6,000 inquiries per month or less than 200 inquiries per day

An estimate of the volume for each selected centre was made. The following rule was then applied to determine the number of questionnaires allocated to each centre:

Category	Number of Questionnaires Allocated
A	400
B	200
C	100

When the completed questionnaires were returned, each response was coded for computer analysis.

All questionnaires, with the exception of those from Banff, were analyzed as a group and as three separate subsets. The subset analyses were conducted to allow the identification of regional trends and to allow a comparison between the responses from provincial and local centres. We were unable to carry out a comparison of centres by size grouping. However, given the relative compositions of the provincial and local subsamples, the comparisons between provincial and local centres acts as a reasonable proxy for a large centre/small centre comparison.

1.3 Sample

The sample includes 54 centres located as follows:

Region	No. of Centres in Region	Centres in Sample	
		No.	% of Total
A	29	12	41
B	37	9	24
C	16	11	69
D	10	2	20
E	17	7	41
F	7	1	14
G	10	4	40
H	8	1	13
I	10	6	60
Banff	1	1	100
Total	**145**	**54**	**37.2**

The sample represents 37.5% of the (144) centres operating in BC. It was not practical to include the same percentage of centres from each region. Rather we focused on getting the best representation from the regions which handle the bulk of the visitors. According to the 1982 provincial records of person trips, the most travelled regions are A, B, C, E, G, and I. In each of these regions, at least four centres are included in the sample. The sample also includes most of the high volume centres and all of the BC centres.

As shown below, the sample tends to underrepresent regions B and F and overrepresent regions C and I. However, no single centre in the sample represents more than 9% of the total responses (in BC) and the BC centre responses do not dominate the local centres responses (32.6% of the total sample vs 67.4% of the total sample, respectively).

Region	Proportion of 1982 Person-Trips	Proportion of Sample
A	20.2%	19.4%
B	30.1%	24.3%
C	12.8%	20.1%
D	4.8%	3.1%
E	11.1%	14.0%
F	4.2%	0.7%
G	6.5%	4.7%
H	2.5%	1.4%
I	7.8%	12.3%
	100 %	100 %

Despite the loading problems, the sample may be considered to be a reasonable representation of the tourist information centres in BC.

Table A.1 shows the allocation of questionnaires and the response rate by centre and by region. 7,400 questionnaires were distributed and 4,393 were returned, giving a relatively high response rate (59.4%). However, the response rate varied substantially between centres, thus distorting the regional representation of the sample -- the regional trends tend to reflect the centres with the highest response rate.

1.4 Biases

The method of data collection and sample selection result in biases which must be kept in mind when interpreting the results. These include:

(1) A high level of control was not possible in the administration of the questionnaires. It is not likely that questionnaires were completed by all or even most of the visitors to each centre during the data collection period. Those visitors completing questionnaires were likely those who:
   - were assisted by a travel counsellor
   - were not in a hurry
   - were pleasantly disposed toward the travel counsellor.

TABLE A.1: QUESTIONNAIRE ALLOCATION AND RETURN RATE BY CENTRE AND REGION

Centre	No. of Questionnaires Allocated	No. of Questionnaires Returned	Response Rate (%)	Returned Questionnaires as % of: Region	Returned Questionnaires as % of: BC Sample
Region A					
Sidney, Highway 17	100	37	37	5	.9
Sidney, in town (S)	100	39	39	5	.9
Victoria, 812 Wharf	400	152	38	19	3.6
Victoria, BC	100	26	26	3	.6
Duncan	100	100	100	12	2.4
Lake Cowichan	100	26	26	3	.6
Nanaimo, Cassidy (S)	100	70	70	9	1.7
Nanaimo, Centre	100	31	31	4	.7
Parksville	100	71	71	9	1.7
Qualicum Beach	200	91	46	11	2.2
Courtenay	100	95	95	11	2.2
Campbell River	100	79	79	9	1.9
Total	**1,600**	**817**	**51**	**100**	**19.4**
Region B					
Whistler	100	80	80	8	1.9
Gibsons	100	28	28	3	.7
Robson Square, BC	400	89	22	9	2.1
North Van (S)	100	9	9	1	.2
Van Airport, BC	400	34	9	3	.8
White Rock	100	44	44	4	1.0
Douglas, BC	400	375	94	37	8.9
Abbotsford, BC	300	297	99	29	7.1
Hope	100	65	65	6	1.6
Total	**2,000**	**1,021**	**51**	**100**	**24.3**
Region C					
Osoyoos, BC	100	95	95	11	2.3
Osoyoos	100	13	13	2	.3
Oliver	100	15	15	2	.3
Penticton, South (S)	100	89	89	11	2.1
Penticton, Jubilee	200	167	84	20	3.9
Penticton, North (S)	200	98	49	11	2.3
Kelowna, South (S)	199	95	95	11	2.3
Kelowna, North (S)	100	41	41	5	1.0
Vernon, South (S)	100	94	94	11	2.2
Vernon, 33rd St	100	41	41	5	1.0
Vernon, North (S)	100	99	99	11	2.4
Total	**1,300**	**847**	**65**	**100**	**20.1**
Region D					
Creston	100	73	73	55	1.7
Nelson	100	60	60	45	1.4
Total	**200**	**133**	**67**	**100**	**3.1**

... continued

TABLE A.1: QUESTIONNAIRE ALLOCATION AND RETURN RATE continued

Centre	No. of Questionnaires Allocated	No. of Questionnaires Returned	Response Rate (%)	Returned Questionnaires as % of: Region	Returned Questionnaires as % of: BC Sample
Region E					
Mt. Robson, BC	100	100	100	17	2.4
Enderby	100	94	94	16	2.2
Salmon Arm, South (S)	100	68	68	12	1.6
Chase	100	38	38	6	.9
Kamloops, East (S)	100	97	97	16	2.3
Kamloops, 10th Ave	100	97	97	16	2.3
Kamloops, West (S)	100	98	98	17	2.3
Total	**700**	**592**	**85**	**100**	**14.0**
Region F					
Williams Lake	100	29	29	100	.7
Total	**100**	**29**	**29**	**100**	**.7**
Region G					
Prince Rupert	100	82	82	41	1.9
Terrace	100	78	78	40	1.9
New Hazelton	100	34	34	17	.8
Smithers	100	3	3	2	.1
Total	**400**	**197**	**49**	**100**	**4.7**
Region H					
Dawson Creek, BC	100	60	60	100	1.4
Total	**100**	**60**	**60**	**100**	**1.4**
Region I					
Golden, BC	200	197	99	38	4.7
Radium Hot Springs	100	95	95	19	2.3
Invermere	100	63	63	12	1.5
Kimberley	100	26	26	5	.6
Yahk, BC	100	99	99	19	2.3
Fort Steele	200	36	18	7	.9
Total	**800**	**516**	**65**	**100**	**12.3**
Banff, BC	200	181	91		
TOTAL	**7,400**	**4,393**	**59**		

(S) = Satellite centre

The responses may, therefore, be more positive than they would be from the average centre visitor. They may also overstate the proportion of visitors who are encouraged to add attractions to their itinerary or extend their stay in BC.

(2) The sample only includes visitors who actually used an information centre; those who could not find a centre are not included.

(3) The sample under-represents low volume centres, and the results may tend to understate the frequency of problems occurring at low volume centres.

(4) When examining the results on a regional basis, it is important to be aware of which centres are providing the data. For example, Regions F and H are represented by only one centre; Region D is represented by only 2 centres; Region A tends to take its sample from the lower half of Vancouver Island; and Region B tends to be weighted in favour of the BC centres located in the Lower Mainland.

1.5 Findings

The response frequency for the questionnaire survey are shown in Table A.2. The percentages shown on the tables indicate the proportion of the sample (or subsample) which chose that specific response. For example, in the BC Sample, 42.8% of the respondents indicated they were looking for accommodation information, 13.5% indicated restaurant information, 44.6% indicated directions, and so on. Because some people chose more than one answer to questions, the percentages do not necessarily add to 100%.

1.5.1 The Total Sample

Response frequencies are tabulated for the total sample, excluding Banff, by tourist region in Table A.3.

Limitations

When comparing results across regions or when comparing results for one region with those for the entire sample, the following data-related limitations should be kept in mind:

- The number of cases for each question is shown in the table -- the larger the number of cases, the more reliable the trends indicated by the data.
- Region A is slightly overloaded by responses from the Victoria-GVVIC centre, which represent 20% of the Region A subsample.
- Region B is overloaded significantly by responses from the provincial centres at Douglas and Abbotsford which represent 37% and 30% respectively of the Region B subsample.

TABLE A.2: RESPONSE FREQUENCIES FOR MAJOR SUBSAMPLES

		BC Centres	Local Centres	BC Sample	Banff
Visitor residence					
No. of cases		1,335	2,809	4,144	179
BC		17%	38%	31%	4%
Other Provinces		21%	34%	32%	40%
Other Countries		62%	28%	37%	56%
Information sought					
No. of cases		1,361	2,793	4,154	180
Accommodation		42%	42%	43%	47%
Restaurant		11%	15%	14%	8%
Directions		56%	40%	45%	52%
Places to visit		60%	45%	50%	90%
Special events		12%	17%	15%	16%
Regulations		15%	14%	15%	24%
Other		11%	13%	12%	14%
Got information needed					
No. of Cases		1,362	2,797	4,159	181
Yes		98%	94%	95%	98%
Partly		2%	5%	4%	2%
No		0%	1%	1%	0%
Likely to add items					
No. of Cases		1,312	2,598	3,910	176
Yes		78%	68%	71%	91%
Not sure		17%	22%	20%	8%
No		5%	10%	9%	1%
Staff impressions					
No. of Cases		1,337	2,699	4,036	179
Well dressed	Yes	98%	91%	93%	99%
	OK	2%	9%	7%	1%
	No	0%	0%	0%	0%
Friendly	Yes	99%	97%	98%	99%
	OK	1%	3%	2%	1%
	No	0%	0%	0%	0%
Knowledgeable	Yes	99%	95%	96%	99%
	OK	1%	5%	4%	1%
	No	0%	0%	0%	0%
Changes to facilities					
No. of Cases		1,129	2,423	3,552	156
No change		65%	53%	58%	62%
Better road signs		10%	22%	18%	10%
Better parking		9%	8%	8%	21%
Imprve extrior		1%	7%	5%	1%
Imprve intrior		0%	1%	1%	0%
Add phone		6%	9%	8%	7%
Add pub washrm		11%	16%	14%	7%
Other changes		9%	7%	8%	7%

... continued

TABLE A.2: RESPONSE FREQUENCIES FOR MAJOR SUBSAMPLES continued

	BC Centres	Local Centres	BC Sample	Banff
Importance of centre				
No. of Cases	1,355	2,777	4,132	179
Very important	26%	76%	79%	91%
Nice to have	14%	23%	20%	9%
Not important	0%	1%	1%	0%
Non BC Res influenced to extend stay				
No. of Cases	972	1,591	2,563	158
No	69%	64%	66%	49%
1 day	17%	18%	17%	15%
2 days	7%	8%	8%	13%
More than 2 days	7%	10%	9%	23%
BC Res influenced to extend stay				
No. of Cases	184	938	1,122	7
No	60%	57%	57%	*
1-6 hours	13%	19%	18%	*
7-24 hours	6%	11%	10%	*
More than 24 hours	21%	13%	15%	*

* Not enough cases.

TABLE A.3: RESULTS FOR TOTAL SAMPLE (EXCLUDING BANFF) BY REGION

	BC Sample	Tourist Regions A	B	C	D	E	F	G	H	I
Visitor residence										
No. of cases	4,144	803	996	834	132	584	29	195	57	514
BC	31%	38%	24%	43%	43%	30%	45%	29%	30%	12%
Other Provinces	32%	23%	18%	39%	26%	45%	21%	24%	32%	53%
Other Countries	37%	39%	58%	18%	31%	25%	34%	47%	38%	35%
Information sought										
No. of cases	4,154	809	1013	834	126	585	28	193	57	509
Accommodation	43%	44%	40%	54%	37%	39%	11%	23%	46%	44%
Restaurant	14%	19%	12%	15%	18%	11%	11%	5%	18%	10%
Directions	45%	46%	58%	34%	45%	39%	39%	36%	53%	43%
Places to visit	50%	52%	56%	45%	41%	38%	43%	62%	49%	56%
Special events	15%	14%	14%	24%	9%	10%	11%	11%	21%	10%
Regulations	15%	15%	13%	11%	12%	15%	25%	19%	23%	23%
Other	12%	14%	12%	9%	12%	15%	14%	18%	18%	9%
Got information needed										
No. of Cases	4,159	805	1014	837	133	585	29	190	59	507
Yes	96%	95%	96%	95%	93%	95%	97%	95%	95%	97%
Partly	4%	4%	3%	5%	6%	5%	3%	5%	5%	2%
No	0%	1%	1%	0%	1%	0%	0%	0%	0%	1%
Likely to add items										
No. of Cases	3,910	738	968	772	121	547	27	183	57	497
Yes	71%	76%	75%	71%	69%	61%	63%	68%	82%	67%
Not sure	20%	18%	19%	20%	18%	25%	22%	18%	16%	24%
No	9%	6%	6%	9%	13%	14%	15%	14%	2%	9%
Staff impressions										
No. of Cases	4,036	780	993	811	129	558	28	184	55	498
Well dressed Yes	93%	95%	95%	92%	94%	91%	86%	95%	95%	88%
OK	7%	4%	5%	8%	5%	9%	7%	5%	5%	12%
No	0%	1%	0%	0%	1%	0%	7%	0%	0%	0%
Friendly Yes	92%	98%	98%	98%	97%	97%	96%	99%	100%	97%
OK	1%	2%	2%	2%	2%	3%	4%	1%	0%	3%
No	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%
Knowledgeable Yes	96%	96%	98%	96%	97%	94%	84%	93%	100%	96%
OK	4%	4%	2%	4%	2%	6%	16%	7%	0%	4%
No	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%
Changes to facilities										
No. of Cases	3,552	691	857	738	115	498	21	148	49	435
No change	58%	58%	64%	55%	52%	52%	62%	67%	53%	61%
Better road signs	18%	15%	13%	22%	23%	21%	14%	11%	8%	20%
Better parking	8%	8%	12%	7%	17%	6%	5%	2%	6%	3%
Imprve extrior	5%	6%	3%	4%	9%	13%	14%	0%	0%	5%
Imprve intrior	1%	1%	1%	1%	3%	1%	0%	1%	0%	0%
Add phone	8%	9%	5%	8%	11%	9%	0%	7%	22%	12%
Add pub wshrm	14%	20%	9%	17%	14%	12%	5%	14%	4%	16%
Other changes	8%	7%	9%	6%	6%	9%	0%	8%	12%	6%

... continued

TABLE A.3: RESULTS FOR TOTAL SAMPLE continued

	BC Sample	Tourist Regions A	B	C	D	E	F	G	H	I
Importance of centre										
No. of Cases	4,132	792	1008	831	128	584	28	194	59	508
Very important	79%	82%	81%	78%	76%	73%	86%	83%	92%	78%
Nice to have	20%	18%	18%	21%	22%	26%	14%	17%	8%	21%
Not important	1%	0%	1%	1%	2%	1%	0%	0%	0%	1%
Non BC Res influenced to extend stay										
No. of Cases	2,563	437	667	442	69	365	16	126	36	405
No	66%	55%	68%	64%	68%	70%	44%	78%	67%	68%
1 day	17%	21%	16%	18%	14%	17%	37%	11%	14%	17%
2 days	8%	12%	8%	8%	6%	6%	6%	5%	8%	6%
More than 2 days	9%	12%	8%	10%	12%	7%	13%	6%	11%	9%
BC Res influenced to extend stay										
No. of Cases	1,122	268	201	316	48	154	12	52	13	58
No	57%	57%	56%	57%	54%	61%	42%	71%	24%	40%
1-6 hours	18%	20%	17%	16%	15%	23%	33%	8%	15%	24%
7-24 hours	10%	10%	10%	12%	8%	8%	0%	11%	15%	12%
More than 24 hours	15%	13%	17%	15%	23%	8%	25%	10%	46%	24%

- Region C is slightly overloaded by responses from the main Penticton centre, which represent 20% of the Region C subsample.
- Region F is represented by only 29 responses.
- Region G is overloaded significantly by responses from the centres at Prince Rupert and Terrace, which each represent 40% of the Region G subsample.
- Region H is represented by only one centre.
- Region I is significantly overloaded by responses from the provincial centre at Golden, which represent 40% of the Region I subsample.

Responses relating to individual centre characteristics may not be representative of the entire region when serious overloading occurs. However, the responses which relate to visitor reactions will be representative for the region if large volume centres are weighted. Therefore, rigorous regional comparisons are not appropriate in all situations.

Analysis

Visitor Origin. The composition of the total sample, excluding Banff (hereafter called the BC Sample) differs from the composition of the visitor trip-counts described by the Ministry of Tourism for 1982.

Visitor Origin	BC Sample	1982 Person-trips in BC
BC	31%	48%
Other Provinces	32%	26%
Other Countries	37%	26%

It appears that a smaller portion of the BC sample who use the centres are BC residents. These data likely reflect regional marketing efforts and the general tourist traffic flow.

Information Sought by Visitors. The most commonly sought information is:

Information	% of BC Sample	Range by Region
Places to visit	50%	A - 62%; E - 38%
Directions	45%	B - 58%; C - 34%
Accommodation	43%	C - 54%; G - 23%

The remaining information categories (restaurants; special events; fishing, hunting, and camping regulations) were each sought by about 15% of the respondents.

Satisfying visitors' information needs. The tourist information centres in the BC sample are clearly providing the type of information desired by visitors. In only 4% of the responses were visitors less than satisfied. There are

no significant regional difference in the responses.

Adding items to itinerary. 71% of the visitors in the BC sample indicated that as a result of their visit to the centre, they would likely see or do more than they had planned. All of the regions except E (at 61%) reflect this high percentage. However, this percentage is likely an overstatement due to the built in bias (#1) mentioned in section 1.4.

Staff impressions. Despite variations in centre policy on dress codes and uniforms, the staff from centres in the BC sample were viewed as well-dressed by 93% of the respondents. The staff were also considered to be friendly (98% of respondents) and knowledgeable (98% of respondents). There are no significant regional differences.

Changes to centre facilities. 42% of the BC sample indicated that some changes could be made to improve the centre facilities. This was reasonably consistent across all regions. However, the comments were not consistent enough to highlight any serious common deficiencies. The changes suggested most frequently are:

- improved road signing (18% of respondents)
- additional public washroom facilities (14% of respondents).

The exterior and interior appearance of the centres are not a major concern. Only 1% and 5%, respectively, of the respondents indicated that improvements should made in these areas.

The importance of centres to the travelling visitor. Tourist information centres are clearly important to those visitors who use them. 79% of the respondents considered the centres to be very important. The responses are reasonably consistent across all regions.

Influencing visitors to extend their stay. The responses indicate that 34% of the non BC-resident respondents were encouraged to add at least one extra day in BC to their travel schedule. Of these visitors, one-half tended to stay two or more extra days. This is likely somewhat overstated due to the built in bias (#1) described in section 1.4. When regional loadings and subsamples sizes are considered, only region A differs significantly from the BC sample average. In this region, 45% of the respondents indicated an intention to extend their stay. Again, the built in bias (#1) will tend to inflate this rate.

Responses from BC residents indicate that 25% were encouraged to extend their stay more than 6 hours. However, there is no indication of whether the duration of the holiday period (in BC) was actually affected. Some of these extensions may represent regional transfers.

1.5.2 Provincial Centres and Local Centres

The BC sample has been divided into two subsamples: PC

centres and local centres. The frequency of responses by type of centre are shown in Table A.2.

Limitations

The BC centre subsample included all the provincially run centres in BC, but 50% of the responses originate from the centres at Douglas and Abbotsford. The results, therefore, tend to reflect trends existing at these centres. The local centre subsample has no loading problems : no single centre represents more than 6% of the subsample responses.

Analysis

Visitor origin. The provincially run centres show a higher proportion of non-BC resident visitors, particularly non-Canadian visitors, than the local centres. This is to be expected considering the proximity of the provincial centres to major points of entry.

Information sought by visitors. Only in the categories of Directions and Places to Visit were the responses significantly different for the local and provincially run centres. Visitors to the provincially run centres more frequently sought information on places to visit and directions than did visitors to local centres. This may be a result of the higher proportion of non-BC resident visitors to the provincial centres.

Satisfying visitors' information needs. Despite the generally higher level of training for staff at the provincial centres, the data show no significant difference in the level of visitor satisfaction with the centres.

Adding items to itinerary. Crosstabulations of visitor origin in provincial and local centres and items added to itinerary are shown below:

Visitor origin	% of visitors at provincial centres adding items ...	% of visitors at local centres adding items ...
BC	72%	67%
Other Provinces	72%	65%
Other Country	81%	74%

These data indicate that both types of centres are slightly more effective in encouraging visitors from other countries to add attractions than they are in encouraging Canadian visitors. The data also suggest that provincial centres are slightly more successful in encouraging visitors to add items than are local centres.

Staff impressions. Only in the area of dress is there is significant difference between the provincial and local centres. The provincial centres received a slightly more positive response.

Changes to centre facilities. A smaller proportion of respondents felt that facility improvements were needed at the BC centres. The major difference between the two types of centre involved signage. Better road signs were requested by 22% of the local centre respondents and 10% of the provincial centre respondents.

The importance of centres to travelling visitors. The perceived value of centres varied with the origin of the visitor as follows:

	% Respondents Choosing "Very Important"	
Visitor Origin	**Provincial Centres**	**Local Centres**
BC	81%	71%
Other Provinces	82%	78%
Other Countries	88%	81%

The data indicate that a higher proportion of visitors from other countries perceived the provincially run centres and the local centres as "very important."

Influencing visitors to extent their stay. The data suggest that there is no significant difference between the two types of centres' success at extending a visitor's stay.

2.0 VISITOR INTERVIEW RESEARCH

The study also involved 83 personal interviews with tourists (at 21 centres) after they had been assisted by travel counsellors. The major results of this research are presented in the body of the report. Figure A.2 summarizes some supplementary information not presented in the main report.

The questionnaire used for the personal interviews is shown in Figure A.3. Figure A.4 illustrates the data collection method used in all centres contacted in the study.

3.0 FOCUS GROUP RESEARCH

A focus group market research technique was used to interview visitors to the Robson Square Tourist Information Centre. Because of the relaxed atmosphere, group discussion environment, and longer duration, the focus groups enabled us to address issues we could not cover (in any depth) in the brief structured tourist interviews.

Detailed information was collected on tourists' likes and dislikes, their holiday planning process, their information requirements, and their opinions of the centre service and facilities. The focus group meeting plan is shown in Figure A.5.

FIGURE A.2: SUPPLEMENTARY INFORMATION FOR TOURIST INTERVIEWS

A. Sample Description

Responses: 83

Place of Residence:			Details of Canada (Rest):		Details of USA:		Details of Other:	
BC	21	25%	Alberta	15	Calif	11	W Ger	3
Canada (Rest)	29	35%	Saskatchewan	2	Ariz	2	Eng	2
USA	28	34%	Manitoba	1	Utah	1		5
Other	5	6%	Ontario	7	Idaho	1		
	83		Quebec	2	Wash	4		
			Nova Scotia	1	Penn	2		
			NWT	1	Flor	1		
				29	NJ	1		
					Ill	2		
					Oreg	3		
						28		

B. Information Requested at Centre

Of the 83 cases, at least 149 pieces of information were requested. This means that on average each person was interested in getting information in more than one category.

Information Categories:	#	% of Requests	% of Cases
Directions or maps	53	36%	64%
Places or things to see & do	29	19%	35%
Camp sites	21	14%	25%
Accommodation	20	13%	24%
Hunting & fishing locations	5	3%	NA
Hunting & Fishing regulations	4	3%	NA
Restaurants	2	1%	NA
Miscellaneous	15	7%	NA
	149	100%	

NA = not enough responses to make % meaningful.

Most common type of information requested concerned directions or maps. 2nd most common concerned places or things to see and do.

C. Additional Facilities Mentioned as Being Desirable:

Total of 20 comments were made in all 83 interviews.

Refreshment (e.g., coffee, drinking fountain, etc.)	3
Inside washrooms	3
Bench or picnic area	3
Large wall map with accom (or other) info on it	3

Other individual remarks concerning possible additions to existing facilities:

- Ticket outlet
- Reservation service
- Telidon terminal for self-serve info
- Telephone
- On-site washrooms (even when one was at gas station nearby)

FIGURE A.3: INTERVIEW GUIDE FOR TOURISTS

Tourist Region ___

Centre ___

1. Your residence: BC ___ 1.
Other Canada ___
Other Country ___

2. What information were you looking for? 2.

Accommodation ___ Special events ___
Restaurants ___ Fishing, hunting or
Directions ___ camping regulations ___
Places to visit ___
Other _____

_____

3. Did you get the information you needed? 3.

Yes ___ Partly ___ No ___

What was missing? _____

Comments (quality, quantity): _____

_____

_____

4. As a result of your visit to the centre: 4.

Will you spend more of your holiday in BC than planned? Yes ___ How many extra days ___
No ___

Will you visit more attractions/events than planned? Yes ___ Which ones? _____

_____

No ___ _____ No. ___

Have you made any other changes to your plans as a result of your visit to the centre?

_____

_____

Interviewer Judgement: Regional transfer ___
Net gain to BC ___
Can't judge ___

5. What were your impressions of the staff? (friendly, well-informed, appearance) 5.

_____

_____

_____

Well-dresssed	Yes ___	OK ___	No ___
Friendly	Yes ___	OK ___	No ___
Knowledgeable	Yes ___	OK ___	No ___

6. What do you think of the tourist centre? (access, parking, extension, interior) 6.

_____

_____

_____

No change ___ Improve outside ___
Better road signs ___ Clean-up inside ___
Better parking ___

7. What additional facilities and services would be helpful at this centre? 7.

_____

_____

_____

Reservations Service ___ Public telephone ___
Public restrooms ___

8. How would you have obtained the information you wanted if there hadn't been an information centre here? 8.

Not obtained it ___
Roadside business ___

Other (specify) _____

9. Have you at any time on this trip wanted to find a tourist information centre, but there wasn't a centre nearby? Yes ___ No ___ 9.

10. How important is it to you to have information centres available when you are travelling? 10.
Very important ___ Nice to have ___ Not important ___

11. If there were no information centre system, how would this affect the enjoyment derived from your holiday? 11.
Serious negative effect ___
Minor negative effect ___
No effect ___

12. Would you be willing to pay for any of the services or materials provided at information centres? 12.
No ___
Yes ___ Standard charge per inquiry ___
Specialized brochures ___
Other (specify) _____

13. Have you used any other government or local information services before or during this trip? 13.
No ___ Comment _____

Yes ___: _____

Written inquiry	___	BC	___	Local	___	Other	___
Telephone inquiry	___	BC	___	Local	___	Other	___
Stop at another centre	___	BC	___	Local	___	Other	___

14. From the Information Centre, what impression do you get of BC as a place to visit or live? 14.

_____

_____

_____

15. Party size ___ 15.

16. Holiday ___ or business ___ 16.

17. Destination: local ___ or non-local ___ 17.

FIGURE A.4: DATA COLLECTION RECORD

Centre	Visited	Interviews: Centre Staff	Interviews: Sponsor	Interviews: Businesses	Interviews: Tourists	Questionnaires	Comments
Region A							
Sidney, Main	x	x	x		x	x	
Sidney, 1st St	x					x	
Victoria, GVVIC	x	x	x	x	x	x	
Victoria, BC	x					x	
Duncan, Main	x					x	
Lake Cowichan	x					x	
Chemainus	x						Volume too low
Ladysmith	x						Volume too low
Nanaimo, Cassidy	x					x	
Nanaimo, Main	x	x	x		x	x	
Parksville	x	x	x		x	x	
Qualicum Beach	x					x	
Qualicum Bay	x						Volume too low
Courtenay	x					x	
Campbell River	x	x	x	x	x	x	
Region B							
Gibsons	x	x	x		x	x	
Whistler	x	x	x		x	x	
Douglas, BC	x	x			x	x	
White Rock	x					x	
Van Airport, BC	x					x	
Robson Square, BC	x	x			x	x	
North Van, Cap & Marine	x					x	
Abbotsford, BC						x	
Hope	x					x	
Region C							
Osoyoos, BC	x	x			x	x	
Osoyoos	x					x	
Oliver	x					x	
Penticton, South	x					x	
Penticton, Main	x	x	x			x	
Penticton, North	x				x	x	
Kelowna, South	x					x	
Kelowna, North	x					x	
Vernon, South	x				x	x	
Vernon, Main	x	x	x	x		x	
Vernon, North	x					x	

... continued

FIGURE A.4: DATA COLLECTION RECORD continued

Centre	Visited	Interviews: Centre Staff	Interviews: Sponsor	Interviews: Businesses	Interviews: Tourists	Questionnaires	Comments
Region D							
Yahk	x					x	
Creston	x					x	
Salmo	x						Not operating for 1983
Nelson	x	x	x		x	x	
Region E							
Mt. Robson, BC						x	
Enderby	x					x	
Salmon Arm, South	x				x	x	
Salmon Arm, Main	x	x	x				Volume too low
Salmon Arm, North	x				x		Identical structure to South. Little benefit adding to questionnaire sample
Chase	x					x	
Kamloops, East	x					x	
Kamloops, Main	x	x	x	x	x	x	
Kamloops, West	x					x	
Ashcroft	x						Operating only part-time. Volume too low
Region F							
Williams Lake	x	x	x		x	x	
Region G							
Smithers	x					x	
New Hazelton	x	x	x		x	x	
Terrace	x					x	
Prince Rupert	x	x	x	x	x	x	
Region H							
Dawson Creek, BC						x	

... continued

FIGURE A.4: DATA COLLECTION RECORD continued

Centre	Visited	Interviews: Centre Staff	Interviews: Sponsor	Interviews: Businesses	Interviews: Tourists	Questionnaires	Comments
Region I							
Golden, BC	x	x			x	x	
Golden	x			x			Volume too low
Radium	x		x			x	
Invermere	x					x	
Kimberley	x	x	x	x	x	x	
Fort Steele						x	
Cranbrook	x					x	
Alberta							
Banff, BC						x	

Volume too low = Average daily volume considered too low to make questionnaire worthwhile.

FIGURE A.5: FOCUS GROUP MEETING PLAN

1. **INTRODUCTION**

   . Meeting format (welcome, informal, purpose, duration, food)
   . Introductions (name, home location, travel mode, destination)

2. **TRAVEL PLANNING**

   . When do you start planning?
   . How do you get information on places to visit?
   . What information do you like to get?
      Format - brochures, booklets, maps
      Type - accommodation, attractions, restaurants, weather, transportation
      Depth - rating system, cost.
   . BC system for responding to information requests is to provide Travellers Handbook, Accommodation Guide, Road Map, and specific brochures depending on the type of request.
      Who received any of this information before making the trip?
      Normally it takes a few weeks to get this information. Would this be a problem? Available at travel agencies?
      Information satisfactory for you and people you know?
      Encourage visits to BC? Image of BC?

3. **INFORMATION CENTRES**

   . When on a holiday, what services would you like an information centre(s) to provide? Materials (including hunting and fishing regulations)? Physical facilities? Location and number? Access?
   . Should Centres look the same throughout the province?
   . Suppose there were no information centres. How would this affect your holiday? (e.g., decision to visit, enjoyment, likeliness of returning, recommendations to friends)
   . Would information on winter holidays in BC help you plan or encourage you to take a winter holiday?
   . Should the centres be used for market surveys ($ spent, attractions, etc.)

4. **ROBSON SQUARE INFORMATION CENTRE**

   . What do you think about this centre?
      Easy to get to (signs, parking, access, convenient)
      Appearance (out, in)
      Staff (dress, friendly, helpful)
      Material (quality, quantity, image of BC)

.../2

- How does it compare with other information centres you've visited in BC and other parts of the World?
- If there were a nominal charge ($\leq$ $5.00) for services offered at the centre, would you be willing to pay?
- What additional services here and at other Information Centres (tickets for events, hotel reservations, etc.)?
- Willingness to pay for:
  - High quality brochures?
  - Ticketing?
  - Reservations?

5. **COMPUTERIZED INFORMATION**

- Would you try to use it?
- What information would you seek? (e.g., hotels, restaurants, alternate plans, attractions)
- Should computer information take the place of staff? In part?
- Willing to pay for this service?

6. **OTHER COMMENTS**

The group discussions were conducted on two weekdays and involved 22 visitors representing France, Germany, Holland, Japan, New Zealand, USA, and Canada (Alberta, Ontario, and Quebec).

The results have been incorporated with those of our other primary research techniques in the body of the report.

4.0 OTHER PERSONAL INTERVIEWS REGARDING TICs IN BC

As indicated in Figure A.4, our TIC research also involved in-depth interviews with representatives of information centre staffs, sponsoring organizations, Regional Tourist Associations, and local business groups. Results from this research are incorporated in the body of the report.

Figures A.6 through A.9 shows the interview guides for:

Information Centre Staff
Sponsors
RTAs
Businesses, respectively.

FIGURE A.6: INTERVIEW GUIDE FOR INFORMATION CENTRE STAFF

1. Season and hours of operation?

2. Please briefly outline the composition of the staff and the duties of each individual.

3. Is there a sufficient number of people on staff to carry out all the functions required to run an information centre?

4. Training and experience of the supervisor? Adequate?
   Training and experience of the travel counsellors? Adequate?

5. Do people generally feel that the Travel Counsellor's course provides sufficient training?

6. (Local centres only) Are people who have attended the Travel Counsellor's course given greater responsibility for handling inquiries?

7. What methods are used to recognize outstanding performance? Are these methods adequate?

8. Do the travel counsellors deliberately draw the visitor's attention to attractions and events the visitor doesn't know about? How often does this happen (percentage of inquiries)?

9. In general, is the quantity and quality of the reference material in this centre sufficient to answer most inquiries? Specific comments:

   The Reference Manual:
   very useful__ fairly useful__ not useful__

   Other BC government material: Excellent__ Fair__ Poor__

   Local/regional material: Excellent__ Fair__ Poor__

10. How do you keep up to date with the activities and events that are available in the local area?

11. Do you feel that tourists would be willing to pay for any of the services or materials provided at information centres?

    No__ Yes__: Standard charge per inquiry ____
    Specialized brochures ____
    Other (specify) ____

12. What do you think of the physical facilities?

Attractive exterior?	Yes__	Fair__	No__
Clean/well maintained interior?	Yes__	Fair__	No__
Adequate room for displays, brochures?	Yes__	Fair__	No__
Adequate telephones?	Yes__	Fair__	No__
Adequate washrooms?	Yes__	Fair__	No__

13. BC centres: What do you think of the uniforms?
Local centres: How desirable would it be for the staff to have uniforms?

14. About how many inquiries (i.e., party inquiries) do you have on a busy day during your peak period?

personal ____
telephone ____
mail ____

15. What are the main problems (in priority order) encountered by the staff in running this centre?

16. What suggestions do you have for improving the operation of the centre?

FIGURE A.7: INTERVIEW GUIDE FOR SPONSORS

1. Name of organization.

2. Please provide a breakdown of the annual operating costs of the centre: labour
   light and heat
   telephone
   maintenance
   equipment leases
   other

3. Please provide an estimate of the capital (i.e., construction) cost of the centre. How are capital costs being paid for (e.g, through an initial lumpsum payment or a mortgage)?

4. Please outline the sources of funds for the centre's operation. Are these funds adequate? Do you encounter any problems obtaining these funds? What are they?

5. Please provide a breakdown of staff employed by the centre and of the average hourly wage for each group:

	No.	Av.Hr. Wage	Av. Age	Av.# of Yrs. at Centre	% int. in hosp. career
full-time year-round					
part-time year-round					
full-time seasonal					
part-time seasonal					

6. What criteria are used to select staff? Is it difficult to find qualified staff? Is turnover a problem?

7. How many inquiries did you have during your most recent fiscal year: personal ____
   telephone ____
   mail ____
   (Note: This should be on the basis of party inquiries.)

8. About how many inquiries do you have on a busy day during the peak period? personal ____
   telephone ____
   mail ____

9. What are the objectives of your organization in operating the centre?

10. To what extent do you believe these objectives are being met?* If not being met, why not?

11. What are the main problems (in priority order) associated with the operation of the centre?

12. What suggestions do you have for improving the operation of tourist information centres?

13. What additional services would it be desirable to provide if more funds were available?

14. Would it be desirable for centres to become more involved in supplying information to local residents about local cultural, recreational, and sports events?

15. What criteria do you use for accepting material to be distributed at the centre? (E.g., Are memberships in the organization required? Do you charge fees for accepting material? Are there any kinds of quality criteria?)

16. How feasible/desirable are the following potential funding sources:
    - user fees for inquiries or certain brochures
    - portion of city taxes
    - special levies on tourist-oriented businesses
    - lotteries
    - commissions on ticket sales
    - sale of souvenirs (e.g., posters)

17. Are there any other feasible/desirable funding sources?

18. What kind of support do you get from the local community (especially the business community)?

19. What are your thoughts about the roles and responsibilities of the federal government, provincial government, Regional Tourist Associations, local groups, and other agencies in the operation of the system of centres?

* After this question has been answered, the interviewer will ask about the extent to which Objectives 1 and 2 (see section 2.1) are being met.

FIGURE A.8: INTERVIEW GUIDE FOR REGIONAL TOURIST ASSOCIATIONS

1. Please briefly describe:
   - the membership of the Association and membership criteria
   - the objectives of the Association
   - the main roles of the Association, particularly the information and marketing activities carried out by the Association.

2. What are the functions and responsibilities of the Association with regard to the information centres in the region:
   participation in decisions for allocating funds among centres?
   provision of regional literature?
   provision of guidelines for staff, facilities, literature, etc.?
   coordination of the activities of the various centres?
   other?

3. What are the objectives of the Association for the system of information centres in the region?

4. To what extent do you believe these objectives are being met? If not being met, why not?*

5. What do you think are the main problems associated with the operation of the centres?

6. What suggestions do you have for improving the operation of the centres?

7. What additional services would it be desirable to provide if more funds were availble?

8. Would it be desirable for centres to become more involved in supplying information to local residents about local cultural, recreational, and sports events?

9. Please provide an overview of the literature that the Regional Tourist Association provides to information centres.

10. Would it be desirable to have an intermediate level of information centre -- regional information centres -- that would supply information on attractions, events, etc. in the region as a whole? If yes, where should they be located, how should they be staffed and funded?

11. How feasible/desirable are the following potential funding sources:
    user fees for inquiries or certain brochures
    portion of city taxes
    special levies on tourist-oriented businesses
    lotteries
    commissions on ticket sales
    sale of souvenirs (e.g., posters)

12. Are there any other feasible/desirable funding sources?

13. What are your thoughts, generally, on an alternative system of information centres that would include fewer centres in the region, but better centres (i.e., higher quality of physical facilities, better standard of service, higher quality brochures, etc.)?

14. Their views on the importance of:
    . regional theme
    . uniform design features

15. What are your thoughts about the roles and responsibilities of the federal government, provincial government, Regional Tourist Associations, local groups, and other agencies in the operation of the system of centres?

* After this question has been answered, the interviewer will ask about the extent to which Objectives 1 and 2 (see section 2.1) are being met.

FIGURE A.9: INTERVIEW GUIDE FOR BUSINESS PEOPLE

1. Is the tourist information centre beneficial to your business?

2. What proportion of the tourists at your business do you believe visit the centre?

3. What do you think the objectives of the information centre should be?

4. To what extent do you believe these objectives are being met? If not being met, why not?*

5. What are the main problems (in priority order) associated with the operation of the centre?

6. What suggestions do you have for improving the operation of the centre?

7. Are you contributing to the centre at the moment? How much?

8. What additional services would it be desirable to provide if more funds were available?

9. To what extent would your business be willing to contribute toward the costs of these additional services?

10. If provincial funding for local information centres were reduced from present levels, would your business be willing to contribute more toward the operation of the present centre?

11. What are your views on the relative importance of the following factors:
    - highway and on-site signage
    - attractive exterior
    - clean and well maintained interior
    - good interior layout for displays, brochures, etc.
    - personalized service (vs. fully automated service)
    - friendly staff
    - well-informed staff
    - public telephone
    - public washrooms
    - uniform design features among centres
    - nearby commercial services (e.g., gas stations, restaurants)

12. Do they supply information on their business? Do they keep the centre up-to-date when things change?

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* After this question has been answered, the interviewer will ask about the extent to which Objectives 1 and 2 (see section 2.1) are being met.

APPENDIX B

TOURIST INFORMATION CENTRE VISITOR TRENDS

1.0 Introduction

2.0 Steven Muha, "Who Uses Highway Welcome Centres"

3.0 BC Research, "Visitors 79 - Parties Visiting and Not Visiting Information Centres"

APPENDIX B

TOURIST INFORMATION CENTRE VISITOR TRENDS

1.0 Introduction

As part of our background research, we reviewed several reports concerning tourist information centre operations. Two of these studies deal with visitor trends and are summarized in this appendix.

2.0 Steven Muha, "Who Uses Highway Welcome Centres." Journal of Travel Research, Vol XV, No 3, Winter, 1977.

This article uses research about the auto traveller trends in the use of highway welcome centres. Based on data collected in the USA in 1972 by deKadt Marketing and Research Inc., the article states that:

- 73% of all interstate highway travellers had seen an information centre
- 40% of all interstate travellers (54.4% of those having seen a centre) had stopped at least one centre in the previous 12 months
- 12% of all interstate travellers made 64% of all visits to information centres.

These figures indicate that 30% of the people who stop at centres account for 64% of the use (i.e., one-third of the people who use the centres use them frequently).

A 1974 survey of state highway information centres conducted by 3M National Advertising Co. found that visitors to tourist information centres could be split into two groups: 1st time users (49%) and repeat users (51%).

The characteristics of these two groups are reported as follows:

	1st Time Users	Repeat Users	All Auto Travellers
Purpose of trip:			
Visit friends/relatives	31%	40%	42%
Other pleasure	52%	46%	28%
Business/convention	3%	3%	12%
Other	14%	11%	18%
On Vacation: Yes	78%	76%	45%
No	22%	24%	55%
Lodging: Hotel/motel	47%	45%	-
Friend/relative	19%	25%	-
Trailer/RV/Camping	28%	21%	-
Other	6%	9%	-
Information Sought:			
Acccmmodation	4.8%	6.0%	-
Restaurants	5.7%	4.2%	-
Campgrounds	12.8%	9.1%	-
Maps	43.6%	47.0%	-

... continued

	1st Time Users	Repeat Users	All Auto Travellers
Attractions	24.8%	24.1%	-
Other	8.3%	9.6%	-
Reason for stopping:			
Pick up travel information	45.8%	39.3%	-
Restrooms	28.5%	31.9%	-
Eat	6.5%	7.1%	-
Rest	17.1%	19.7%	-
Other	2.0%	2.0%	-

Although these data are based on 1970s experience in the USA, it is likely that the current BC visitor behaviour is similar. The key points as they relate to the BC situation are:

(1) Not all highway travellers see the centres (or are aware of them). This suggests there is room to increase the number of centre users. This can be accomplished by
- increasing the awareness of the existence of centres and of the services they offer
- improved signing and structure visibility
- marking all tourist centre locations on tourist maps.

40% of all highway travellers had used a centre at least once in the past year. This may not be an appropriate measure for use in estimating BC centre usage because many of BC's visitors (particularly BC residents or residents in border states or provinces) would be counted several times as they are visitors to BC more than once a year.

(2) There are habitual users of centres. Our research also indicated a core of users exist who had a strong commitment to centre use while travelling.

(3) Travellers on business trips represent only about 3% of centre users, while those on vacation represent about 75%. This emphasizes the importance of catering to the vacationing traveller.

(4) There were no characteristics measured in the study which differentiated repeat visitors from first time users -- particularly in the areas of "information sought" and "reason for stopping." This suggests there is potential for increasing centre use by providing good, friendly service and encouraging first time users to become repeat users.

(5) The "information sought" varied with location. However, it is interesting to note that while maps, attractions, and camping information were commonly sought, accommodation information apparently was not.

(6) The "reason for stopping" data is likely similar for BC. While the need for travel information is an obvious

reason for stopping, 30% of the people stopped to use the restroom and 20% stopped to rest. This emphasizes that these are valuable offerings to the traveller as well.

3.0 BC Research, "Visitors 79 - Parties Visiting and Not Visiting Information Centres", prepared for Tourism BC.

This report describes trends exhibited by non-resident visitors to BC (including only those who spent one or more nights in BC). The research involved interviewing 15,000 parties at BC border points as they left the province between May and October, 1979. The sample was divided into "those who had visited at least one information centre" and "those who had not visited any centres" during their stay in BC.

The following general findings are important:

- 77% of visiting parties stay in BC overnight (non-resident only). The 23% that does not stay overnight in BC represents only 4% of the total days spent by tourists in BC and only 3% of the expenditures. These statistics emphasize the low impact of non-overnighters and the importance of converting some of these to overnighters. If the centre staff can interest these visitors in attractions, they may be encouraged to return as overnighters.

- The average tourist spends time in only 1.6 regions in BC. The data show that:
  - 65% of the tourists visit only 1 Tourist Region
  - 20% of the tourists visit only 2 Tourist Regions
  - 15% of the tourists visit 3 or more Tourist Regions.

  These proportions emphasize the importance of provincial centres maintaining a high profile in areas near border crossings. Not only do these centres have the potential to catch the bulk of the traffic, but they also have an opportunity to encourage tourist dispersion and longer trips by making the visitor aware of the many tourism products located throughout BC.

- 28.5% of the visitors visited one or more centres. (A visitor is defined to be any person who enters BC for any purpose.) This means that 22% of all (non-resident) tourists visit information centres. This figure can be used to estimate the impact of centres. (A tourist is defined to be a person who visits BC and stays for one or more nights.)

- By place of origin, the percentage of visitor parties visiting TICs is as follows:

Alberta	19%
Other Canada	29%
Washington	28%
California	36%
Other USA	38%
Overseas	40%

A detailed profile of the subsample is presented below.

		Those Who Visited Centres	Those Who Didn't Visit Centres
Party size		2.91(±.16)*	2.45(±.07)*
Party Composition:	1 or 2 children	22.2%	16.6%
	3 children	7.1	3.9
	single adult	9.3	24.0
	2 adults	50.8	44.9
	3 adults	4.2	4.8
	4 adults	5.2	4.6
	5 adults	1.0	0.5
	more than 5 adults	0.2	0.7
		100.0%	100.0%

* The error term describes the range available within 95% confidence limits.

Parties who visited centres were slightly larger than those who didn't visit centres (2.9 is probably a better conversion factor of people to inquiries than the 2.5 currently being used). A larger percentage of parties who visited centres travelled with children (29.3% vs 20.5%) and a smaller proportion were single adults (9.3% vs 24.0%).

		Those Who Visited Centres	Those Who Didn't Visit Centres
Visitor origin:	Other Canada (non BC)	22.1%	87.9%
	Other	34.2%	65.8%
Age distribution		No significant difference	
Income distribution		No significant difference	

While there were no significant age or income differences between those who visited centres and those who did not, there was a significantly higher percentage of non-Canadian visitors who made use of the centres.

		Those Who Visited Centres	Those Who Didn't Visit Centres
Length of stay:			
Total nights/person away from home		15.90(±.89)	11.84(±.52)
Nights/person in BC		6.48(±.36)	5.40(±.26)
Regional Nights/Person:	A	7.25(±.60)	7.30(±.59)
	B	7.42(±.52)	6.03(±.32)
	C	8.03(±.73)	6.63(±.49)
	D	7.62(±1.06)	6.71(±.59)
	E	7.69(±.56)	6.83(±.39)
	F	10.52(±1.69)	10.21(±.96)
	G	9.94(±1.46)	7.56(±.82)
	H	7.68(±2.08)	5.68(±1.42)
	I	6.86(±.68)	4.74(±.30)

When the error limits are considered, those who visited

centres were on longer trips (about 2.5 nights longer), but were only spending 0.5 nights more in BC. With longer trips, this group would tend to have more flexible time, thus providing a better opportunity to sell them on extending their stay in BC.

When the error limits are considered on a regional basis, only Regions B and I show any difference. In both cases, those who visited centres had longer trips (e.g., 0.5 nights longer for Region B and 1 night longer for Region I). The data also indicate that stays in Regions F and G are longer for the entire sample than the other regions.

		Those Who Visited Centres	Those Who Didn't Visit Centres
Expenditures in BC ($Can/person/day)		21.76(±1.13)	21.57(±.88)
By Region:	A	27.22(±1.19)	24.32(±1.94)
	B	25.72(±1.99)	29.72(±1.68)
	C	16.25(±1.53)	16.09(±1.32)
	D	15.86(±2.71)	12.52(±1.54)
	E	18.78(±1.48)	18.19(±1.59)
	F	17.83(±4.00)	14.29(±3.30)
	G	26.49(±5.18)	15.72(±2.46)
	H	17.90(±3.42)	23.74(±5.87)
	I	15.78(±1.54)	15.02(±1.50)
By Category :	Accommodation	5.03(±.38)	5.04(±.35)
	Meals/Refreshements	4.95(±.35)	5.93(±.34)
	Groceries/Beverages	1.98(±.18)	1.56(±.09)
	Auto Transport	3.74(±.31)	2.91(±.16)
	Non-auto transport	3.19(±.19)	1.19(±.26)
	Recreation	1.47(±.16)	1.55(±.20)
	Shopping	2.90(±.53)	2.34(±.24)
	Other	0.76(±.74)	1.48(±1.49)

The data show no difference in expenditures in general and no difference when compared on a category basis. Region G, however, does show a higher expenditure rate (by $3.13) for those who used information centres.

		Those Who Visited Centres	Those Who Didn't Visit Centres
Accommodation:	Hotel	10.9%	17.1%
	Motel	32.5	29.5
	Resort	0.5	0.4
	Friends/relatives	11.3	27.2
	Cottage own/rent	0.6	1.8
	Govt camp/park	18.1	7.5
	Private camp/park	22.2	12.5
	Camping other	2.9	2.3
	Other	1.0	1.7
		100.0%	100.0%

Travel Mode:	RV	21.6%	11.8%
	Auto	61.3	60.1
	Other	17.1	28.1
		100.0%	100.0%

The data show a trend for centre visitors (as opposed to centre non-visitors) to spend less time in hotels, less time overnighting with friends, and significantly more time camping (43.2% vs 22.3%). As might be expected they also show a higher proportion travelling in RVs. With 21.6% of non-resident users travelling in RVs, it is extremely important to have easy access for these large vehicles.

	Those Who Visited Centres	Those Who Didn't Visit Centres
Most important activity (or primary purpose of trip) :		
Visit friends/relatives	18.6%	32.2%
Business	5.3	15.2
Shopping	2.4	4.5
Passing through	9.4	11.0
Sightseeing	44.2	18.4
Swimming	2.9	3.5
Festivals/events	3.5	3.2
Camping	5.3	3.0
Boating	0.8	1.3
Fishing	3.5	3.6
Hunting	0.1	0.1
Other	4.0	4.0
	100.0%	100.0%

While a lower proportion of those who visited centres indicated that business and visiting friends and relatives were the primary activity and a higher proportion indicated sightseeing as the main activity, the data indicate that that there is little difference in actual participation levels of the two groups.

APPENDIX C

MARKET TRENDS RELEVANT TO BC'S TOURIST INFORMATION CENTRES

1.0 Introduction

2.0 Information from the BC Tourism Plan

3.0 Information from Other Documents

4.0 Results from Consultations

5.0 Implications for Information Centre Program

APPENDIX C

MARKET TRENDS RELEVANT TO BC'S TOURIST INFORMATION CENTRES

1.0 Introduction

It is essential that the future system of information centres in British Columbia and the programs employed to support the centres be consistent with emerging market trends and developments in the province's tourism industry. In order to identify these trends, the Study Team held discussions with federal and provincial tourism planners, reviewed the BC Tourism Plan[1] and other documents on tourism held by the provincial Ministries and CGOT in Ottawa, and took a second look at previous DPA studies on tourism, including the Lakelse Lake Hot Spring Resort study completed in October, 1980, and the study, "Economic Rationale for Tourism Development in Western Canada", completed in September, 1983 for CGOT.

2.0 Information from the BC Tourism Plan

Our understanding is that the BC Tourism Plan completed in 1980 represents the most recent comprehensive analysis of the province's tourism market. The following travel industry trends identified in that document could be relevant to the province's information centres:

- Compared with the average resident, the typical traveller from the province's major tourism markets (the rest of BC, Alberta, the United States, and overseas) has higher income and educational levels, and often is in a professional, technical, or managerial occupation.

- Rising energy prices are affecting people's travel plans and the tourism industry generally. However, questions remain regarding the magnitude and long-term effects of these developments. Since many people in North America regard their annual vacation as a right, it is possible that people will continue to travel, but the distances will be shorter and/or single destination trips and package tours will be favoured over touring vacations in automobiles.

- Air, bus, boat, and train travel are likely to increase in popularity over the automobile. In particular, fly-drive and packaged destination vacations which provide a broad range of activities and facilities could grow in popularity. For Canada and BC, this could result in reduced visitations from the United States, although this shift could be offset by increasing travel within Canada by Canadians.[2]

- Most of BC's major tourism markets will display much lower growth in population and per capita income over the next twenty years than they did in post-war decades

up to the early 1970's. For most markets, the annual growth in population will be between 1% and 2%, and gross national product on a constant dollar basis will generally increase by between 3% and 4% per annum. The only major markets that will experience higher growth in gross product are Alberta and Japan.[3]

- The baby boom generation is now moving into the key family formation years. Consequently, the 23-35 age group will be the most dominant group over the next ten years. This group has traditionally been viewed as the population segment with the highest propensity to travel.

- With the increasing education levels and growing concern for the quality of life, many travellers are looking for more meaningful and sophisticated vacation experiences, which include cultural, artistic, and educational activities.

- Environmental awareness is increasing, and there is a growing concern for possible environmental degradation from overuse and crowding of facilities.

- The trend toward early retirement is accelerating. Many retirees travel, often in the off-season, thereby helping to mitigate the seasonality problems of many tourist destinations and expanding the off-season market.

- There will continue to be pressure on the Canadian balance of payments. Consequently, the value of the Canadian dollar will remain low relative to other currencies, and the cost of a Canadian vacation will continue to be highly competitive with alternative destinations.

- Tourism will have a high profile as one of Canada's major industries, and will be the target of major government programs to bolster the economy and redress the balance of payments deficit.

The Technical Report projects the number of person-trips in BC tourism from 1978 to 1983 to grow by 4% per year from 11.3 million to 13.7 million (compared with a growth of 5.6% from 1972 to 1978). The number of person-nights was expected to rise by 4.5% per annum from 48.1 million to 60 million, and total tourism expenditures was expected to show real growth of 4.5% per annum from $1,453 million to $1,812 million.

Growth in tourism expenditures by market segment were estimated as follows:

US Residents	- 17% per annum
Other International	- 8.1%
BC Residents	- 4.8%
Other Canadian	- 5.6%.

The following compares the growth in person trips from 1972

to 1978 by market segment with the 1978-1983 forecasts in the Technical Report.

Market Segment	Average Annual Growth Rates (%): 1972-78 Actual	1978-83 Projections*
US Residents	-0.8	1.4
Other International	16.8	8.0
BC Residents	8.7	4.9
Other Canada	10.9	5.5
Total: All Segments	5.6	4.0

* For some market segments, the Technical Report provides a range. We have used the mid-point of the range for 1983.

Source: Table 21, Technical Report, p. 217.

The BC Tourism Plan does not offer precise, quantified projections of the BC tourism market after 1983. However, it does provide qualitative long-term forecasts for the Canadian market and the tourism industry in general. The forecasts suggest that Other International visitors will represent a growing proportion of the Canadian tourism market and the portion accounted for by visitors from the US will decline through the rest of this century. While direct comparisions are difficult, it appears that the market share held by Canadians travelling in Canada will remain constant through the 20 year projection period.

The Technical Report concludes that the tourism market in the last two decades of this century will become increasingly diverse and competitive, and tourists will be more sophisticated and demanding. The document offers the following conclusions on long-term market trends[4]:

(1) It will become increasingly important for marketing strategies to identify those market segments which are to be targeted for promotion, and to efficiently reach these markets through a proliferation of communications from competing sources.

(2) If these markets are to be attracted, it is essential that BC have a competitive product and a plant that meets the requirements of the sought-after market segments.

(3) Having a "match" of markets and product, the third key dimension to a successful strategy will be carefully conceived alternative modes of "connecting" the tourist to his/her destination area. These modes must acknowledge the serious potential for energy shortages in the future and the certainty of higher prices for energy.

(4) Finally, it is critical to appreciate in a long-term planning horizon that future tourism development must be in harmony with the natural environment as well as the social environment of BC.

Some of the trends identified in 1979-80 are still relevant, but others -- such as the rapid growth of the Alberta economy and the low value of the Canadian dollar relative to all currencies[5] -- are of dubious relevance at the present time. Furthermore, higher energy prices are no longer viewed as a certainty over the next few years. The worldwide recession badly distorted longer-term market trends in the tourism industry, as well as many other segments of the world economy.

3.0 Information from Other Documents

Other documents provide information on near-term developments in the BC and Western Canadian tourism industry.

The DPA study recently completed for CGOT confirms that the overseas market continues to be the most rapidly expanding market segment in Western Canada. For the four western provinces combined, overseas visitors increased their share of international travel from 5% in 1976 to 11% in 1980. Although the majority of overseas visitors are from the United Kingdom and West Germany, the new Pacific Rim market has expanded significantly, particularly in BC. Using 1982 BC data, the DPA study points out that overseas visitors tend to stay longer and spend more than other groups -- they spend about $37/day and stay an average of 10 days; visitors from the US spend about $34/day and stay an average of 4.2 days.

In terms of domestic tourism, the DPA study notes that from 1978 to 1981 travel between provinces in Western Canada expanded at nearly double the rate of in-province travel. This may reflect the impact of such provincial tourism promotions as Travel Alberta, Celebrate Saskatchewan, and Super Natural British Columbia.

In contrast, the importance of travel to the Western region from other parts of Canada is fairly insignificant at present, and has shown no increase over the 1978-81 period. Comparing Western Canadian travel trends with those of the rest of Canada, the DPA study concludes that Western Canadians have become much more travel-oriented during the past few years.

Bringing these results together, the most recent pre-recession data suggest that:

- overseas visitors and visitors from the other three Western provinces could account for a growing proportion of the BC tourism market in the coming years;
- the proportion accounted for by BC residents could be fairly steady; and
- the role of US visitors and visitors from Eastern Canada could decline over the longer term.

These findings are broadly consistent with the projections from the BC Tourism Plan Technical Report.

The document, "Tourism Highlights: 1982", produced by the BC Ministry of Tourism provides data on the performance of BC tourism since the start of the world recession in 1981. This

document indicates that both tourism revenue (in terms of constant dollars) and the number of visitors (or person-trips) showed serious year-over-year declines in 1982. By market segment, the largest decline in person-trips was recorded by BC residents and the smallest by overseas visitors. Total person-trips fell significantly from 13.2 million in 1979 to 11.5 million in 1982. However, 1982 was the first year in a long time to experience an absolute decline in tourism expenditures.

Medium term growth in person-trips by market segment is estimated as follows in the document:

Market Segment	1978-1982 Average Annual Growth in Person-Trips (%)
BC Residents	-4.1%
Other Canadian	4.6%
United States	4.3%
Overseas Visitors	7.5%
Total: All Segments	**0.0**

These figures indicate that no growth has occurred in tourist visitations in BC over the medium-term, since growth in out-of-province market segments was totally offset by the decrease in BC resident travel within the province. The figures suggest that the recession had a particualrly strong impact on the travel plans of BC residents over the past two to three years.

The BC Tourism model operated by BC Research generates projections of BC tourism activity for the current year (1983) and for two years into the future. Their most recent projections were published in May, 1983 and are based on data up to the end of December, 1982. The model results indicate that in 1983 the BC travel industry will continue to show a decline in activity, but the rate of decrease will moderate. For example, the year-over-year decrease in the number of person-trips is estimated to be 2% in 1983, compared to an annual decrease of 8% in 1982. By market segment, overseas visitors are expected to remain at their 1982 level, while other market segments will display small declines.

The model's projections for the medium-term indicate that total tourist visitations will continue to decline, displaying year-over-year decreases of 2% in both 1984 and 1985. The pattern by market segment is expected to be unchanged from 1983.

4.0 Results from Consultations

Because of the pervasive nature of the recession, it is difficult to know what weight to give to near-term developments in the BC tourism industry. This problem was discussed with two senior tourism planners in the federal and provincial governments. The planners stressed how difficult it is to develop trend figures for ten to twenty years into the future, and noted that all the information in this area

tends to be qualitative. They pointed out that there are too many factors external to tourism which have major effects on visitor volumes and modes of travel.

Some additional points made in these discussions include the following:

(1) Most planners are still predicting a long-term relative decline in the "rubber tire" market, although the recession may have decelerated this longer-term decline. Rubber tire trips are still being made, but high gas prices and smaller cars may be shortening their duration.

(2) Travel by recreational vehicle has continued to increase through the recession. An RV represents a major investment, but it reduces ongoing travel costs. RV travel is especially important to BC because of the orientation toward wilderness opportunities.

(3) Expo '86 could result in a large inflow of tourists in 1986, but experience with major events of this type in other locations suggests that a sharp decline could occur in the next year.

(4) The regional distribution of BC tourism activity has not changed greatly in the past five years. The most important developments are more rapid growth in Region I (BC Rocky Mountain) -- reflecting expanded marketing efforts oriented particularly to the region's ski resorts -- and strong expansion in Region H (Peace River Alaska Highway) from a very small base. Growth in Region I is expected to continue in light of the Panorama development which is designed to extend the ski season in the Region by 4 to 6 weeks.

(5) Tourism growth in the Okanagan and the Rocky Mountain Region is closely tied to the development of condominiums and retirement and summer homes to serve residents of Calgary and Southern Alberta in general.

(6) In general, the regional distribution of BC tourist activity is not expected to change greatly over the next five to ten years.

(7) Cyclical factors should be given important weight in tourism planning. One planner expressed the view that during a recession people take short low-budget vacations, and bank both money and time in order to take a major trip once the economy recovers.

5.0 Implications for Information Centres Program

For this analysis, we are adopting the view that most of the longer-term trends identified in the BC Tourism Plan and in the most recent pre-recession data are relevant today, and are the market trends which should be used in evaluating the BC information centre program. It is recognized, however,

that different trends may operate with different force over the short to medium-term, and, in some instances, their effects may not be discernible for the next few years.

The longer-term trends described above hold many important implications for the future operation of BC's information centres, including:

(1) The Visitors '79 Survey indicates that the proportion of tourists visiting the information centres increases with the tourists' distance from BC. 40% of the visiting parties from overseas stopped at one or more centre(s) during their BC stay, compared with 19% for visitors from Alberta and 28% for visitors from Washington. Given the growing importance of overseas tourists in the BC market, the implication is that, over time, a rising proportion of tourists will stop at the BC information centres. Accordingly, the centres' role in BC's tourism strategy appears to be taking on added importance.

(2) The increasing propensity for Western Canadians to travel suggests there may be a substantial increase in the number of first-time visitors to BC from the three other Western provinces. First-time visitors may have a greater inclination to stop at information centres, providing further growth to the centres' client group.

(3) The services, brochures, etc of the centres should be increasingly directed toward the overseas visitor. This view reflects a number of factors:
- as noted in (1), this market segment will experience the highest growth
- overseas visitors take longer trips on larger, and probably more flexible budgets; consequently, there is a greater probability for the centre to influence the length of their stay in the province and/or the number of attractions they attend
- overseas visitors tend to be both demanding and discriminating -- if the centres can satisfy their requirements, they will be in a good position to satisfy the needs of other market segments.

(4) The tourism market is becoming increasingly competitive and sophisticated. The competition factor means that the services and information materials provided by the BC centres must be competitive with other jurisdictions' in terms of quality and price. The growing diversity and sophistication means that the BC centres must be able to cater to the needs of different types of tourists -- indicating a need for a broad range of information materials and well-trained staff with a sound knowledge of the province's many tourism assets. The larger centres will likely be in a better position to meet the competition and cater to these diverse requirements.

(5) Medium-terms programs involving the centres should be directed toward maximizing tourism benefits from Expo

'86. Specific efforts could include:
- services and materials to extend the length of stay
- efforts to include the BC Tourist Regions in the Expo visitors' trips to BC; these would be needed to reduce overcrowding in the Lower Mainland and to provide a more equitable regional distribution of the tourism benefits from Expo '86
- services, brochures, etc. directed toward encouraging repeat visits in the next year, in order to mitigate the serious drop in tourist visitations which generally follows a major event.

(6) Both resident tourists and visitors from outside the province have evidenced a growing concern for overcrowding at major recreation facilities and are increasingly aware of the potentially negative effects tourism can have on the environment. Information centre staff could increase their efforts to encourage visits to alternative facilities and to encourage return trips during the off-season or shoulder seasons.

(7) The development of destination resorts and areas plays a major role in the province's tourism strategy. Destination points are needed to attract a high growth segment of the tourist market. First consideration for new information centres -- or centres which result from consolidating two or more existing centres -- should be given to locations near existing destination resorts which are experiencing significant increases in visitations and to totally new destination points.

(8) The "rubber tire" trade will continue to be very important to the BC tourism industry for the foreseeable future, but its overall position will probably experience a gradual decline. This decline in market share could accelerate when the economic recovery builds some momentum. This trend reinforces the view that priority should be given to destination points as locations for new or consolidated centres. As well, studies should also be used to measure the potential value of placing centres at regional airports which are gateways to expanding tourist areas.

(9) Information centre programs should be able to respond flexibly to changes in the economic cycle. During a slump, the centres could be geared toward meeting the needs of people on short, low-budget vacations. These people would be more interested in adding attractions (especially low-cost attractions) than extending their stay in BC. As we move out of the recession, the number of people on extended, high cost trips may increase. Then, greater efforts could be focussed on services and information directed toward extending the tourist's stay in BC.

FOOTNOTES

1. More specifically, the report "BC Travel Industry Study Phase I: Development Strategy, Technical Report", produced by Marshall, Macklin, Monaghan under the Tourism Agreement.

2. Ibid, pp 313-318. See also, Williams, P.D. et al., "The Potential Impact of Gasoline Futures on 1979 Vacation Travel Strategies" , Journal of Travel Research, Volume XVIII, Number 1, Summer, 1979.

3. Ibid, pp. 304-312. See also, the " Future of the World Economy", a United Nations Study by V. Leontief et al, 1977; and in the case of Alberta, "Employment Trends in Alberta", Alberta Advanced Education and Manpower, March, 1980.

4. Ibid, p. 351.

5. As of the Fall of 1983, the value of the Canadian dollar is high except in relation to the American dollar.

APPENDIX D

BENEFIT-COST METHODOLOGY AND GUIDELINES FOR EVALUATING THE TOURIST INFORMATION CENTRES IN BRITISH COLUMBIA

1.Ø Introduction
2.Ø General Approach
3.Ø Effectiveness of an Existing Centre
4.Ø Amalgamating Centres
5.Ø Assessing a New Centre
6.Ø Comparing Centres Across Regions
7.Ø Effectiveness of the Total BC System
8.Ø Sensitivity Tests
9.Ø Conclusions

APPENDIX D

BENEFIT-COST METHODOLØGY AND GUIDELINES FOR EVALUATING THE TOURIST INFORMATION CENTRES IN BRITISH COLUMBIA

1.Ø INTRODUCTION

The purpose of this Appendix is to outline a benefit-cost methodology and set of guidelines for assessing the system of tourist information centres in British Columbia. The guidelines and methodology could be applied to the following situations:

- assessing the effectiveness of and need for an existing centre
- evaluating the potential benefits from amalgamating two or more centres
- assessing the potential effectiveness and need for a centre in an area not currently served by a centre.
- determining the appropriate size of a new centre
- assessing the effectiveness of a system of centres in a Tourism Region in order to determine whether there are too many or too few
- evaluating the effectiveness of the total BC system.

The following sections describe the general approach proposed for this analysis. They also provide specific examples of how the methodology could be applied (using hypothetical examples of the situations described above). A final section offers a set of benefit-cost guidelines which can be readily applied to actual situations and can be used to assess the current system of information centres.

2.0 GENERAL APPROACH

The proposed benefit-cost methodology includes the following features.

1. The methodology and guidelines are simple and straightforward to apply, and are based on readily available data. At the same time, the methodology is consistent with generally accepted benefit-cost practices, as described in "Guidelines for Benefit-Cost Analysis", Province of British Columbia, Environment and Land Use Committee Secretariat (June 1977).

2. The benefit-cost methodology uses the total British Columbia society as the referent group.

3. The economic costs of constructing and operating a centre include the cost of constructing the building (or purchasing the trailer), the cost of materials, utilities, etc., needed to operate the centre, and the opportunity cost of the labour needed to run the centre. Subsidies from the provincial government to the centre are a transfer within the province and therefore should not be deducted from the economic costs of the centre. Federal subsidies to the centres (to reimburse wage costs) could be viewed as an economic benefit to the province. However, it can be argued that this type of wage subsidy is not tied to the information centre program but rather would be available to other groups in the province in the absence of the information centres. For this reason and to simplify the calculations, it was decided not to deduct the federal subsidy from the economic costs of the centres.

4. Our research suggests that additional tourism expenditures and net tourism benefits from the operation of the information centres would be derived from three sources:
   - the additional tourism revenues resulting from increases in duration of stay
   - the additional tourism revenues resulting from adding attractions to a visit of the same duration
   - the centre's ability to enhance the quality of the visitor's experience, resulting in repeat visitations and positive word of mouth advertising.

   It was decided that the third source was not readily amenable to quantification. The reasons for this decision are discussed in a later section.

   Our research indicates that the second source is probably much more important than the first. Most visitors do not operate within a flexible schedule. Therefore, centre staff are rarely successful in increasing the length of the visitors stay in British Columbia.

5. The net tourism benefits to the province are defined as the additional tourism revenues (from the first two sources noted in 4) minus the cost of materials,

equipment, services, etc. required to run the affected tourist operations, the opportunity cost of the labour employed by these operations and the proportion of federal taxes which do not return to the province as federal expenditures (assumed to be proportional to population).[1] The affected tourist operations should be representative of the typical mix of tourist operations in the province. "Tourism Highlights 1982", published by BC Tourism, indicated that tourism expenditures in British Columbia are divided as follows:

	Proportion of Total Expenditures
Transportation	24%
Restaurant Meals	23%
Accommodation	20%
Shopping	16%
Recreation/Entertainment	9%
Groceries	8%
	100%

6. In determining the net tourism benefits from a typical mix of tourist operations, the Study Team looked at the results from previous DPA studies (particularly the Lakelse Hot Springs Resort Study) and the financial and economic performance of typical firms in each of the above sectors, using data from the Statistics Canada publication "Corporation Financial Statistics" (Catalogue #61-207). In particular, the Study Team analyzed the ratio of net benefits to total revenue for the following sectors and sectoral groupings: air transport, bus transport, gasoline stations, hotels, food stores, retail trade excluding gas and food, and personal and miscellaneous services excluding hotels. The sectoral distribution of tourism expenditures in BC (see above) provided weights for the calculation of the ratio of net benefits to total revenue for a "typical" tourist operation in the province. This calculation suggested that a typical operation generates about 20 cents of net tourism benefits for every dollar of total revenue. It should be noted that this is only an operating ratio and does not include any capital costs. This assumption is further explored below.

   A final adjustment is made to translate net tourism benefits into net economic benefits for the total province. The rationale and method for this adjustment are discussed in section 3.0.

7. Shadow pricing of labour (that is, adjusting the wage bill to take account of the real cost to society) is applied to the operating costs of the centre and the operating costs of the typical mix of tourist operations. Shadow pricing of labour is appropriate for the following reasons:
   - The BC unemployment rate is currently very high, and expectations are that the BC rate could remain above

the the 10% level for many years.
- Employment opportunities are especially limited for young people during the summer months. This is the type of employment provided by many information centres and tourist businesses.

Based on these factors, it is assumed that one-half of the information centre's summer staff (which typically account for about one-third of the annual wage bill) would have been unemployed in the absence of the centre, and that in the case of the tourist operations, the opportunity cost of labour comes to 75% of the actual wage bill of the operation. (This is consistent with assumptions made by DPA in previous tourism studies in British Columbia.)

Shadow pricing of labour is not applied to the capital costs of the information centres. In some instances, the capital costs could involve the purchase of a trailer which is constructed outside the province.

8. A foreign exchange shadow premium could be applied to the foreign exchange which is either earned or saved as a consequence of the centres' effects on the plans of tourists. Tariff and non-tariff barriers can cause distortions in trade flows that result in a difference between the market price of foreign exchange and its real value to the economy. Under these conditions, it could be appropriate to use a "foreign exchange premium".

The information centres could add to Canada's foreign exchange earnings by:
- the centre influencing a foreign tourist to spend more in BC than in, for example, the United States
- the centre influencing a BC resident or tourist from another province to spend more in BC than in a foreign country (the "import substitution" effect).

On the other hand, Canada's foreign exchange position would not be affected if:
(a) the centre only influenced the distribution of tourism spending among Canadian provinces (either by Canadian or out-of-country residents); or
(b) the centre only increased BC tourism spending at the expense of other expenditures on Canadian produced goods and services. (This could occur for Canadian tourists -- BC and non-BC residents -- travelling in the province.)

In light of the number of possible alternatives, it is difficult to know the precise effects of the centres on Canada's foreign exchange position. In addition, only a fraction of the foreign exchange premium could be assigned to the Province of British Columbia. This fraction would be in line with BC's share of the national population or national imports. Under these circumstances, the foreign exchange premium would likely represent well less than 1% of the additional tourism

revenues resulting from the information centres. Because of the above difficulties and the small impact, it was decided not to employ a foreign exchange shadow premium in the analysis.

9. Shadow pricing (to take account of the real cost to society) is not applied to the cost of materials, equipment, services, etc. required by the information centres or the tourist operations. Therefore, the opportunity cost of material and related inputs is taken to equal the delivered market price. It is standard practice in benefit-cost analysis to apply shadow prices only to the direct effects of a project or program, not its indirect (i.e., supplier-related) or induced effects. The opportunity costs of producing material inputs -- and of producing consumer goods to satisfy the increase in consumer spending -- would be evaluated in separate benefit-cost analyses of these projects and facilities.

10. It is assumed that the additional tourism activity will be distributed among a large number of tourism operations and therefore can be readily absorbed by the existing tourism plant. Therefore, investment in additional tourism facilities would not be needed.

11. Budget constraints are making governments increasingly averse to taking risks. Because of this and the number of assumptions needed to prepare these calculations, it can be argued that the net economic benefits should exceed the economic costs of the information centres by fairly generous amounts. In addition, this situation suggests the need for sensitivity testing to identify the sensitivity of the results to changes in key assumptions. A few tests are attempted in section 8.0.

The next five sections apply this methodology to actual situations. Section 3.0 describes the calculations in some detail. These calculations provide a set of standard ratios which are used in later sections and in developing the guidelines.

FOOTNOTES

1. To expand on this, it is assumed that 89% of federal income taxes represent a "cost" to the province and, therefore, that 11% of these taxes return to the province in the form of federal expenditures.

3.0 EFFECTIVENESS OF AN EXISTING CENTRE

The evaluation of an existing centre involves the following steps.

1. **Number of personal inquiries.** Table 3.3 in the body of the report lists the total personal inquiries in 1982 for the information centres included in our survey. The numbers vary greatly from a few thousand for some of the local centres to close to 300,000 per year for a centre in Victoria. For analytical purposes, we will look at four sizes of centres with total inquiries of 3,000, 10,000, 50,000 and 100,000 per year. It is assumed that each personal inquiry represents a tourist party with an average party size of 2.5 persons.

2. **Proportion of tourists influenced by the centres.** Our research results can be used to estimate the proportion of tourists stopping at the centres who are influenced to increase their stay or to add attractions during their visits. Table 3.9 in the body of the report indicates that 48% of tourist parties stopping at the centres were influenced in a manner which would lead to additional tourism expenditures in British Columbia. In most cases, additional attractions were added, but in a minority of instances, the duration of stay was lengthened (typically by one day). To take account of the possibility that the survey overstated the proportion of tourists who were positively affected, it is assumed here that 30 of the 100 tourist parties stopping at the centres are influenced in the manner described above. Of these 30 tourist parties, 23 add attractions and 7 extend their visits in British Columbia by one day.

   It is recognized that some tourists stop at more than one centre during a trip. The assumption employed here is that (on average) each inquiry generates the same results, regardless of whether it is the first, second or third visit to an information centre during the same trip. In addition, a key assumption is that, without the centre under evaluation, the tourist would not be able to stop at another centre to get the same information. We recognize the potential for overlapping areas between information centres, but the available data will not allow us to quantify the importance of this for specific centres or different types of centres. We anticipate that this is more of a problem for smaller centres than for larger ones.

3. **Additional tourism expenditures.** For those staying an extra day, the number of tourist parties is multiplied by the average party size (2.5 persons) and by the average daily expenditure per tourist, $35.00.[1] For those adding attractions, it is assumed that the per diem expenditures of each tourist increase by 20% or $7.00 per person. This appears to be a reasonable amount of money to allow a typical tourist to travel to and from an attraction, to pay an admission fee (if needed), and to pay for

souvenirs, food, beverages, etc.

4. **Calculation of the net tourism benefits.** The next calculation is to translate the additional tourism expenditures into net tourism benefits in the Province of British Columbia. To do this, it is assumed that each $1.00 of tourism expenditures provides 20 cents of net benefits to the BC tourism industry. This ratio is based on the analysis conducted earlier.

5. **Calculation of the net benefits to the British Columbia economy.** The final step on the benefit side is to compute the net benefits provided to the total British Columbia economy. In the case of non-residents, the net tourism benefits and the net economic benefits would be the same. However, for BC residents, the information centres could result in some redistribution of consumer expenditures from other sectors towards tourism. We have no solid information for making this adjustment. However, the following factors can be employed in developing an "arbitrary assumption":

   - In a typical year, 50% of BC tourists are non-residents and non-residents generally account for over 50% of total tourist expenditures.

   - Because of the high import leakages associated with other sectors of the BC economy, a dollar of spending on tourism probably generates greater economic benefits than a dollar of spending in many other sectors.

   - Because of the popularity of American and other foreign destinations to many BC residents, it is postulated that in many cases the centres prevent BC tourist dollars from "leaking" to the United States.

   Based on these considerations, it is assumed (somewhat arbitrarily) that 90% of the net tourism benefits result in net economic benefits to the total BC economy.

6. **Comparison of the net economic benefits with the economic costs of the information centres.** Table 3.5 in the body of the report indicates that the annual wage bill generally accounts for between 70% and 90% of the annual operating budget of these centres. A ratio of 80% is employed in our examples. In addition, based on the analysis in section 2.0, it is assumed that the opportunity cost of labour come to 83% of the annual wage bill of the centres. Therefore, the opportunity cost (i.e., the real cost to the provincial economy) of operating the centres amounts to 86% of the annual operating budget.

   To simplify the calculations, the capital cost of the centres is placed on an annual basis by assuming an annual capital charge of one-sixth of the capital cost. This annual capital charge is consistent with a

rate of return of 10% per year (in terms of constant dollars). The final step is to compute the benefit-cost ratio for each example, using the net economic benefits as the numerator and the economic costs of the centre as the denominator. A ratio greater than one suggests that the "hypothetical" centre being analyzed may be a "profitable" centre from the perspective of British Columbia society.

Exhibit I presents the calculations for the four hypothetical examples.

The methodology and examples offer some standard ratios which can be used in the rest of the analysis. In particular, it is indicated that on average, 100 personal inquiries (i.e., 100 tourist parties making personal inquiries) at an information centre generate the following results:

- 30 tourist parties who are influenced
- 75 tourists who are influenced
- $1,015 in additional tourism expenditures (or $10.15 for each inquiry)
- $203 in net tourism benefits ($2.03 per inquiry)
- $182.70 in net economic benefits to the total BC economy ($1.827 per inquiry).

The hypothetical examples can also be used to offer some preliminary comments on the types of centres now operating in British Columbia.

. Example A suggests that it is very difficult for a very small centre with inquiries of 3,000 or less per year to be economically feasible. In the example, the capital costs would have to be minimal (perhaps a kiosk) and operating costs would have to be kept very low (below $6,000 per year). The results suggest that very small centres may be difficult to justify on economic grounds from the provincial perspective.

. Example B suggests that a smaller centre with personal inquiries of about 10,000 per year can cover its operating costs, but cannot support a major capital expenditure. For this size of centre, a kiosk or a booth in a shopping mall may be economically attractive.

It is noteworthy that a number of the centres discussed in the body of the report are in the 10,000 range in terms of personal inquiries per annum. These include the BC centres at Osoyoos, Yahk, and Valemont, as well as local centres at Parksville, Campbell River, and Nanaimo. Each could be assessed in terms of the benchmarks provided by Example B. For example, the BC centre at Osoyoos, with personal inquiries of 9,998 per year and an annual operating budget of $20,943, appears to be barely covering its operating cost but could not support any charge for capital. (Unfortunately, no data are available on the capital costs of the BC centres.)

EXHIBIT I: EVALUATING THE EFFECTIVENESS OF FOUR HYPOTHETICAL INFORMATION CENTRES FROM THE PROVINCIAL PERSPECTIVE

	A	B	C	D
Characteristics of Each Centre				
1. Total Personal Enquiries in a Year	3,000	10,000	50,000	100,000
2. Annual Operating Budget ($)	10,000	20,000	65,000	100,000
3. Capital Cost ($)	20,000	50,000	150,000	225,000
Calculation of B/C Ratio				
4. Tourist Parties Influenced				
- Additional Day	210	700	3,500	7,000
- Added Attractions	690	2,300	11,500	23,000
Total	900	3,000	15,000	30,000
5. Tourists Influenced				
- Additional Day	525	1,750	8,750	17,500
- Added Attractions	1,725	5,750	28,750	57,500
Total	2,250	7,500	37,500	75,000
6. Additional Tourism Expenditures ($)				
- Additional Day	18,400	61,300	306,300	612,500
- Added Attractions	12,075	40,250	201,250	402,500
Total	30,475	101,550	507,550	1,015,000
7. Net Tourism Benefits ($)	6,090	20,310	101,510	203,000
8. Net Economic Benefits ($)	5,490	18,270	91,360	182,700
9. Economic Costs of Centres ($)				
- Operating	8,600	17,200	55,900	86,000
- Annual Capital Charge	3,330	8,330	25,000	37,500
Total	11,930	25,530	80,900	123,500
10. Benefit/Cost Ratios	0.46	0.72	1.13	1.48

Notes and Assumptions:

1., 2. & 3. are hypothetical examples which are representative of different types of centres covered in the survey.
4. 30 of 100 visitors to information centres are influenced in some way. Of these, 7 extend their stay by one day and 23 add attractions
5. Average party size of 2.5 persons.
6. $35.00 per person per day for visitors who stay an extra day; $7.00 per person per day for visitors who add attractions.
7. 20% of additional tourism expenditures.
8. 90% of net tourism benefits.
9. "Economic" operating costs equal 86% of annual operating budget; the annual capital charge equals one-sixth of capital costs.
10. Net economic benefits (8.) divided by the economic costs of the centre (9.).

- Examples C and D offer Information Centres which appear to be economically viable from a provincial perspective. Nonetheless, these results can be used to suggest some possible guidelines for these types of centres. To cite a few examples:
  - Example C could not support a capital facility of more than $220,000 .
  - Example C could not support an annual operating budget of more than $77,000 per annum.
  - In light of the "economies of scale" assumed in our example, example D appears to be the strongest of the four centres. However, this centre could not support a 70% increase in its annual operating budget.

- The examples provide possible benchmarks for comparing annual operating budgets and annual inquiries. When annual budgets are more than double the total annual personal inquiries, the centre may not be able to cover its operating costs. When the two are about equal, the centre is probably "paying its own way" (unless the costs of construction were particularly high).

FOOTNOTE

1. The latter figure is taken from "Tourism Highlights 1982" produced by BC Tourism.

4.0 AMALGAMATING CENTRES

A key issue in amalgamating two or more centres is whether the total number of inquiries at the new centre would be more or less than the sum of existing centres. It would be more if the new centre is more effective than the combination of the existing centres in encouraging tourists to leave the highway. The number would be less if tourists are now visiting more than one of the existing centres or if the location of the new centre is not convenient for some tourists visiting the area. In the following example, it is assumed that the above factors are offsetting and that the same number of visitors come to the amalgamated centre. In reality, the result would depend on the locations of the existing and new centres, and how well the current centres are being operated. In this example, three small centres of varying size are amalgamated into a medium-sized centre.

Characteristics of Each Centre	Existing Centres A	B	C	A+B+C	New Centre D
1. Total Personal Inquiries per year	3,000	10,000	15,000	28,000	28,000
2. Annual Operating Budgets	15,000	18,000	28,000	51,000	35,000
3. Capital Cost	1,000	20,000	20,000	41,000	80,000
B/C Ratio					
4. Net Economic Benefits	5,480	18,300	27,400	51,180	51,200
5. Economic Costs of Centres:					
. Operating	12,900	15,500	24,100	52,500	30,100
. Annual Captl.Charge	170	3,000	3,300	6,470	13,300
Total	**13,070**	**18,500**	**27,400**	**58,970**	**43,400**
6. Benefit/Cost Ratios	0.42	0.99	1.00	0.86	1,18
7. Benefit/Cost Ratios Assuming No Capital Charge	0.42	1.18	1.14	0.97	--

In this example, amalgamating the three centres into one appears to be justified, despite the fairly heavy capital expenditure at the outset. This reflects the "economies of scale" which generally exist for a larger centre. (These economies are indicated by the results presented in the body of the report.) It is interesting to note that the amalgamation of the three existing centres appears to be warranted even when the annual capital charge is dropped from the calculation for three existing centres. The capital costs of existing centres may have been nominal, or could have been totally "written off" by this time.)

Two assumptions are critical to the above results.

1. It is assumed the new centre would have the same number of personal inquiries as the three existing centres combined. It is possible that the locational factor would outweigh the effectiveness factor. However, our analysis suggests that the drop-off in visitation (if any) would be minor, and could readily be offset by effective signage and a good location for the new centre. Moreover, the results indicate that the B/C ratio for the new centre would be greater than one even if the decrease in visitations -- compared to the existing centres -- was 15%.

2. It is assumed that the new centre will have the same influence on the decisions of each visitor as the existing centres. In fact, the amalgamated centre would likely be in a position to provide more information and better service. This would mean greater "net economic benefits" per visitor and, therefore, an even higher B/C ratio for the new centre compared with the existing centres in combination.

5.0 ASSESSING A NEW CENTRE

In evaluating the need for a new centre, information would be required on the following:

(a) the number of tourists visiting the area
(b) the number of these tourists who can be expected to visit the information centre
(c) the projected capital and operating costs of the centre.

Information for (a) would be available from studies or could be estimated based on the area's accommodation facilities, recent occupancy rates at these facilities, and the provincial ratio of total tourists to the number of tourists who stay with friends, relatives, etc. Information for (c) should be developed by the local sponsors of the information centres. The most difficult questions involve point (b). The key issue is the number of additional inquiries (that is, in addition to inquiries already occurring at existing centres) generated by the new centre. This would depend upon:

- the location of the new centre in relation to existing centres
- whether the new centre is located at a destination point for tourists or is in the middle of a travel corridor.

In the event that the new centre does not add to the total number of personal inquiries in the province, its net economic benefits would be zero and the centre would not be justified economically from a provincial perspective. However, if the centre is located at the end of a travel corridor, at a new destination resort, or in an area with few existing centres, the new centre can be expected to add to the total number of inquiries occurring in the province.

It now becomes a matter of estimating the percentage of tourists who can be expected to visit the new centre. Some province-wide figures would provide some guidelines:

1. The Visitors '79 Survey showed that 28.5% of nonresident visitors to BC visited one or more tourist information centres during their visit to the province. Visitors '79 also indicated that the tendency to visit centres increased with the distance from the province. It is possible then that BC tourists travelling in the province visit information centres less frequently than nonresident tourists. Based on the Visitors '79 data, it is reasonable to assume that about 20% of BC tourists visit information centres at least once.

   The results of our research indicate that among the centres in the survey, personal inquiries totalled close to 900,000. This represents 900,000 tourist parties (or 2.3 million tourists). Our field survey covered about 30% of the total number of centres, but a much higher percertage in terms of volume. This is because all of the BC centres and many of the high volume local centres were included in the sample. Our coverage in terms of

volume could approach two-thirds. If this is the case, it is suggested that about 1.3 million inquiries were generated by approximately 4.6 million tourist parties in the province in 1982. These calculations indicate that 100 tourist parties generate about 30 personal inquiries during the course of the year. In this case, tourist parties who visit more than one centre are counted more than once.

The ratio of 30 inquiries for every 100 tourist parties could be used to estimate the number of personal inquiries at a new centre which add to the provincial total, but only if there is strong evidence that these inquiries are not at the expense of an existing centre. This assumption could be critical to the potential effectiveness of a new centre. The following compares two proposed centres with similar characteristics except for one difference -- all inquiries at one centre are "incremental" to the total province whereas one-half of the inquiries at the second centre are taken away from existing centres.

	Centre A	Centre B
Characteristics of Proposed Centre		
1. Tourist Parties Visiting the Area	100,000	100,000
2. Total Personal Inquiries in a Year	30,000	30,000
3. "Incremental" Inquiries	30,000	15,000
4. Annual Operating Budge ($)	45,000	45,000
5. Capital Cost	90,000	90,000
Calculation of B/C Ratio		
6. Net Economic Benefits	54,800	27,400
7. Economic Cost of the Centre		
- Operating	38,700	38,700
- Annual Capital Charge	15,000	15,000
- Total	53,700	53,700
8. Benefit/Cost Ratio	1.02	0.51

Centre A may be economically attractive but proposed Centre B, with the same economic costs but one-half of the economic benefits, does not appear to be a viable investment.

The same information can be used to assist in determining the appropriate size for a centre. In Example A, a centre with construction costs of $90,000 appears to be the maximum size

of centre which could be economically justified. In the case of Example B, no size of centre could be justified, since the economic costs of operation exceed the net economic benefits.

6.Ø COMPARING CENTRES ACROSS REGIONS

The methodology and guidelines could also be used to compare the effectiveness of the system in two or more Tourist Regions in British Columbia. Exhibit II compares the nine BC Tourist Regions in terms of the number of centres, total tourism revenues in 1982, tourism revenues per centre, and the estimated number of inquiries per centre. These data suggest that a typical centre in Regions A and B serves more tourists per year than a typical centre in the other seven regions. This is the expected result, since these two regions have the largest tourism industries and travel flows. The benefit-cost guidelines described earlier suggest that, other things being equal, the centres in Regions A and B are more economically viable than the centres in the rest of the province.

However, because our research covered only a portion of the centres in each Region, we do not have complete data on capital and operating costs and the number of inquiries for all centres in any one Region or the total province. Therefore, we can only fully apply the benefit-cost methodology to two hypothetical regions. The first Region (X) is characterized by fairly low tourist visitations and a comparatively large number of centres spread among the Region's communities. As a consequence, centres in Region X are not able to realize the economies of scale which our research identified for larger centres. Region Y has much higher tourist visitations and a mix of smaller, medium and larger centres. Economies of scale result in a lower ratio of operating costs to the number of personal inquiries in Region Y.

	Region X	Region Y
Characteristics of Centres in Each Tourist Region		
1. Total Number of Person-Trips	500,000	3,000,000
2. Number of Information Centres	9	30
3. Person-Trips Per Centre	55,600	100,000
4. Total Personal inquiries	60,000	360,000
5. Inquiries/Centre	6,670	12,000
6. Annual Operating Budget: All Centres Combined ($)	144,000	504,000
7. Total Capital Cost: All Centres Combined ($)	129,600	453,600
8. Additional Tourism Expenditures	609,000	3,654,000
9. Net Economic Benefits	109,600	657,700
10. Economic Costs of the Centre		
- Operating	123,800	433,400
- Annual Capital Charge	21,600	75,600
- Total	145,400	509,000
11. Benefit-Cost Ratios	Ø.75	1.29

Notes:

4. Based on average party size of 2.5 and 30 personal inquiries per 100 tourist parties in the Region.
6. Ratio of annual operating budget/personal enquiries of 2.4 for Region X and 1.4 for Region Y.
7.& 10. "Annual Capital Charge" of 15% of annual operating budget.
8. Average of $10.15/personal inquiry.
9. Average of $1.827/personal inquiry.
10. Economic cost of operating a centre equals 86% of annual operating budget.
11. Net economic benefits/economic cost.

The results suggest that the centres in Region Y, viewed in combination, are "paying their own way" (although it is possible that some centres are less economically viable than others). However, the economic feasibility of the centres in Region X can be questioned, suggesting perhaps the need for some consolidation and amalgamation. It is noteworthy that in Region X the centres are not even covering their operating costs.

EXHIBIT II: COMPARISON OF NUMBER OF TOURIST INFORMATION CENTRES AND TOURISM REVENUE BY BC TOURIST REGION

Region	No. of Centres	Total Tourism Revenue in 1982 ($000)	Tourism Revenue Per Centre ($000)	Estimated Number of Inquiries	
				Total	Per Centre
A	28	445,000	15,900	440,000	15,710
B	37	695,000	18,800	480,000	12,970
C	16	230,000	14,400	122,000	7,620
D	11	84,000	7,600	34,000	3,100
E	17	175,000	10,900	71,000	4,120
F	7	70,000	10,000	28,000	4,000
G	10	150,000	13,600	61,000	6,100
H	8	50,000	6,300	20,000	2,500
I	9	110,000	12,200	44,000	4,890
Total	**143**	**2,009,000**	**14,000**	**1,300,000**	**9,090**

Sources: "Tourism Highlights 1982" prepared by the BC Ministry of Tourism. It should be noted that the CGOT figures on travel receipts differ from the BC Tourism figures for tourism expenditures. In 1980, the CGOT figure for travel receipts was 27% above the BC figure for tourism revenue.

The final two columns represent DPA estimates which are largely based on the assumption that the ratio of inquiries to tourism revenues is the same in all regions. Adjustments were made to be consistent with the data collected. These estimates should be viewed as very preliminary.

7.0 EFFECTIVENESS OF THE TOTAL BC SYSTEM

Finally, the methodology and guidelines can be used to explore the effectiveness of the total system of information centres in British Columbia. Because our data on costs and personal inquiries are from a sample, the ratios employed for this purpose are based on incomplete data. The results, therefore, must be viewed as preliminary. The following major assumptions are used to assess the effectiveness of the current system:

- Our research sample covered two-thirds of total personal inquiries at all information centres in British Columbia.
- The ratio of the annual operating budget to total personal inquiries is 1.8 (i.e., $1.80 is expended for each personal inquiry).
- The annual capital charge amounts to 15% of the annual operating budget.

Employing these assumptions, the current system of information centres in British Columbia can be evaluated as follows:

Characteristics of Centres

1. Number of Person-Trips in BC (1982)	11,480,000
2. Number of Tourist Parties	4,600,000
3. Number of Information Centres	143
4. Person-Trips per Centre	80,300
5. Tourist Parties per Centre	32,200
6. Total Personal Inquiries	1,300,000
7. Personal Inquiries/Centre	9,090
8. Annual Operating Budget: All Centres Combined ($)	2,340,000
9. Capital Costs: All Centres Combined ($)	2,100,000

Benefit/Cost Ratio

10. Additional Tourist Expenditures ($)	13,200,000
11. Net Economic Benefits ($)	2,380,000
12. Economic Cost of the Centres ($)	
- Operating	2,010,000
- Annual Capital Charge	350,000
- Total	2,360,000
13. Benefit/Cost Ratio	1.01

The results suggest that the current system of centres is generating economic benefits which cover the system's economic costs. At the same time, a benefit-cost ratio of 1.01 indicates that the system is operating "very close to the margin" and there is room for improvement. It should be noted, in particular, that the economic performance of all

centres could be dominated by the favorable performances of a comparatively few large-volume centres (especially the larger BC centres). Previous analysis suggests that the economic viability of many smaller centres could be questioned. Finally, the additional tourism expenditures of $13.2 million which are "caused by" the information centres can be compared with total tourism revenues in British Columbia of $2 billion in 1982. This comparison indicates that the information centres may have accounted for about seven-tenths of one percent of the province's total revenues from tourism in 1982.

8.0 SENSITIVITY TESTS

Additional Benefits

In this analysis, the economic benefits from the information centres are based solely on extending the duration of stay and adding attractions to the trips of tourists. These benefits occur during the same trip. Two additional sources of benefits have been identified. Each of these is discussed below.

1. Telephone inquiries could also be a source of benefits. However, information is not available on the number of telephone inquiries by centre from our research sample. Regardless, our consultations suggested that the net benefits from telephone inquiries are likely to be very small. Telephone inquiries generally involve simple information which can be transmitted quickly over the phone and do not involve sales activities.

2. The economic benefits evaluated here are related to only one of the objectives of the information centres, that is, "increase the amount of money spent in BC by visitors". The information centre program also has the objective (Objective 1) of enhancing the quality of the visitor's experience in order to encourage repeat visitations and positive word- of-mouth advertising. (As well, a fourth objective is to encourage tourists to make return trips to BC, particularly during the off-season months. However, the field survey provided little indication that the centres are encouraging return trips in the off-season.)

   Our research results suggested that this first objective is being achieved to a significant degree and provided some results which perhaps could be used to quantify these benefits. For example:
   - 68% of tourist parties believed that information centres were important to their visit;
   - 14% of tourist parties said that a lack of centres would have negatively affected the enjoyment of their holiday.

   These results suggest that, for many tourists, the information centres play a positive role in encouraging return trips and positive word-of-mouth advertising. However, it is difficult to argue that the centres would be the principal causative factor in generating return trips and trips resulting from word-of-mouth advertising. It is possible that tourist visitations in some future year would be lower in the event that the information centres were not in place today. However, it is difficult, if not impossible, to place a precise number on this impact.

   Accordingly, the purpose of the following is not to evaluate this potential source of benefits, but simply to point out the sensitivity of previous results to the

inclusion of benefits from the achievement of Objective 1. The basic assumptions are as follows:

- One out of 100 personal inquiries results in an additional trip to the province.
- The trip occurs (on average) three years after the inquiry.
- The trip involves a party size of 2.5 persons, a duration of 5 days and total tourism expenditures of $440. (These figures are consistent with the 1982 performance described in "Tourism Highlights, 1982").
- Economic benefits occurring in the future are discounted at the rate of 10%.

Employing these assumptions, the net economic benefits resulting from this source would be as follows:

1. Total Personal Inquiries in All BC Centres	1,300,000
2. Additional Trips	13,000
3. Additional Tourism Expenditures	5,720,000
4. Net Economic Benefits	780,000

Note:

4. Net economic benefits equal 18% of additional tourism expenditures divided by a discount factor of 1.33.

The calculations suggest that this source could add about 33% to the net econmic benefits generated by the information centres for the total province. This would significantly improve the benefit-cost ratios for the total system and for the individual centres. However, turning back to the analysis of centres of different sizes, we find that the smaller sized centres (hypothetical examples A and B) would have benefit-cost ratios below one even if their net economic benefits were increased by 33% to take into account these additonal benefits.

Effectiveness of Different Centres

It is assumed throughout the analysis that the net economic benefits generated by each inquiry are the same for all sizes of centres and in each Tourist Region. In fact, this ratio can be expected to vary signficantly for different sized centres and by Region. To cite some examples:

. It is quite possible that larger centres influence a higher proportion of visitors than smaller ones. This could reflect the greater amount of information and better trained staff available in many larger centres. If this is true, the divergence in economic feasibility between large and small centres could be even greater than our hypothetical examples suggest.

- The net economic benefits generated by each personal inquiry could vary signficantly by Tourist Region depending on regional differences in average party size, duration of stay, the per diem expenditures of each trip, and perhaps the commitment of the Regional Tourist Association and other tourist groups to the information centre program. For example, if per diem expenditures were $42.00 per tourist in Region X and $35.00 in Region Y, the benefit-cost ratio of tourist information centre C in Exhibit I would be 1.36 in Region X and 1.13 in Region Y. The economic viability of information centres with similar operating characteristics could vary signficantly between different regions.

- As noted earlier, centres could differ significantly in terms of their ability to attract visitors from the highway. This could depend on location, signage, the attractiveness of the building and grounds, the availability of washrooms, etc.

Differences in Capital Costs

It is recognized that the annual capital charge is not relevant to many centres. This could reflect two factors.

(a) The capital cost of a "kiosk" located at a shopping mall could be as low as $500.

(b) The original capital cost has already been "written off." (In our calculations, this is assumed to occur after six years.)

For these centres, the net economic benefits can be compared with the economic costs of operation. In evaluating the BC system of centres, it is asumed that the annual capital charge amounts to 15% of the annual operating budget. This assumption recognizes that the annual capital charge for many centres is negligible. On the other hand, our research results showed that for many centres which recently purchased a trailer or constructed a building, the annual capital charge could amount to 40% or more of the annual operating budget; this is the situation hypothesized in Exhibit I.

Shadow Price of Labour

We have assumed throughout the analysis that the opportunity cost of labour is the same in all regions and communities of the province. In reality, the opportunity cost of labour would vary depending on the availability of labour, employment opportunities, and wage rates in different regions. One way to test the sensitivity of the results to the shadow price of labour is to assume that labour's opportunity cost is equal to the actual wage in all information centres and tourism operations in British Columbia. By removing the labour shadow price, the net economic benefits/personal inquiry fall from $1.827 (see Exhibit I) to $1.279. When labour is no longer "shadow priced", the benefit cost ratios in Exhibit I are as follows:

	Four Hypothetical Examples A	B	C	D
1. Net Economic Benefits ($)	3,840	12,800	64,000	127,900
2. Economic Costs ($)				
- Operating	10,000	20,000	65,000	100,000
- Annual Capital Charge	3,330	8,330	25,000	37,000
Total	13,330	28,330	90,000	137,000
3. Benefit/Cost Ratios	0.29	0.45	0.71	0.93
4. Original B/C Ratios (from Exhibit I)	0.46	0.72	1.13	1.48

As indicated above, the benefit-cost ratios are below one for all four hypothetical examples when the shadow price of labour is removed. Moreover, only the largest centre is generating sufficient economic benefits to cover its operating cost. This sensitivity test points out that the economic feasibility of the centres is critically related to the employment of labour -- both in the centres and the affected tourist operations -- which would be unemployed in the absence of these centres. This situation is recognized (at least implicitly) by government through the wage subsidies provided by the federal and provincial governments to the information centres.

Capital Cost of Tourist Operations

A critical assumption in this analysis is that the centres' effects on tourism operations can be readily absorbed without an increase in tourism plant. This assumption is defensible at the present time in light of:

- the low occupancy rates currently prevailing in the province's hotel/motel industry;
- the excess capacity in many other segments of the tourism industry;
- the small proportion of BC's tourism revenues which can be directly linked to the information centres.

However, this assumption may become less defensible if "boom-times" return to the BC tourism industry. If allowance were made for capital expansion, net tourism benefits as a proportion of total revenues in a typical tourist operation would decline signficiantly, perhaps by as much as one-half to around the 10% range. This would have an important effect on the net economic benefits generated by the information centres.

Overlapping Areas of Influence Among Information Centres

It is assumed in this analysis that there are no overlaps in the areas of influence among information centres in the same region. This implies that a tourist making a personal inquiry at one centre could not acquire exactly the same information at a second centre. The Study Team recognizes

the potential for overlapping areas of influence and that the net benefits computed for the centres may be overstated for this reason. The benefits may be particularly overstated for some smaller centres which are fairly close to larger information centres. It is difficult to quantify the extent of this upward bias. However, we believe the bias may not be too large. This is because the smaller centres account for a fairly small portion of the total personal inquiries among all information centres in the province. In our field survey, centres with personal inquiries of 30,000 or more accounted for about 80% of the total personal inquiries of all centres in the survey.

Local Perspective

This benefit-cost methodology uses the total British Columbia society as the "referent group". This analysis could also be conducted from the perspective of a community or subprovincial region. In doing small area analysis, three adjustments would need to be made to the ratios used before.

1. The proportion of visitors who are influenced to spend more money would be revised upward to take account of the centre's ability to increase regional tourism expenditures at the expense of other regions. Our research suggests that of the 100 visitors who changed their plans, 20 would represent a net gain to the local area but not to BC (while for six others it was not possible to judge). Based on this, it is assumed that 40 of 100 visitors to information centres are influenced in some way to increase their local spending -- of these, 9 extend their stay and 31 add attractions.

2. Because of the higher tax leakages for a small region, net tourism benefits amount to a smaller percentage of tourism revenues. Using the same procedure as before, it is estimated that net tourism benefits would come to 19% of tourism revenues in the case of a BC region with 10% of the total provincial population.

3. Because of the higher import leakages from a subprovincial economy, a smaller adjustment would be needed in moving from net tourism benefits to net economic benefits. In this example, it is hypothesized that net economic benefits amount to .95 of net tourism benefits.

As well, an argument could be made for subtracting the amount of federal and provincial subsidies from the operating cost of the information centres. Our research indicated that, for the local centres, senior government subsidies cover between 10% and 100% of the annual operating budgets of these centres. (The average for the 13 centres which were surveyed amounts to about 50%.) However, most of these subsidies are for wage reimbursement, and thus involve funds which could be readily available to local governments and local groups for other job-creation projects if the information centres did not exist. Therefore, federal and provincial subsidies have not been deducted from operating costs.

In the following, the benefit-cost ratios from Exhibit I are recalculated from the perspective of a subprovincial region with 10% of the provincial population. Except for the changes listed above, the methodology and data are the same as in Exhibit I.

Calculation of B/C Ratios from a Regional Perspective	Four Hypothetical Examples A	B	C	D
1. Total Personal Inquiries in a Year	3,000	10,000	50,000	100,000
2. Totl Parties Influenced				
- Additional Day	270	900	4,500	9,000
- Added Attraction	930	3,100	15,500	31,000
Total	1,200	4,000	20,000	40,000
3. Tourists Influenced				
- Additional Day	675	2,250	11,250	22,500
- Added Attraction	2,325	7,750	38,750	77,500
	3,000	10,000	50,000	100,000
4. Additional Tourism Expenditures ($)				
- Additional Day	23,600	78,800	394,000	788,000
- Added Attractions	16,300	54,300	271,000	543,000
Total	39,900	133,100	665,000	1331,000
5. Net Tourism Benefits ($)	7,580	25,300	126,000	253,000
6. Net Economic Benefits ($)	7,200	24,000	120,000	240,000
7. Economic Costs of the Centres	11,930	25,530	80,900	123,500
8. Benefit Cost Ratios	0.60	0.94	1.48	1.94
9. Original B/C Ratios (from Exhibit I)	0.46	0.72	1.13	1.48

The benefit/cost ratios are much higher from a regional perspective than from a provincial perspective. In particular, smaller centres are much more attractive from a regional perspective. This helps explain the greater interest of local groups in smaller centres. The higher B/C ratios from a regional point of view are explained by the greater net economic benefits per personal inquiry. In this example, each personal inquiry generates $2.40 in net economic benefits to the region compared with $1.827 when the province is the referent group.

National Perspective

The benefit-cost ratios could also be computed from a national perspective. However, our research did not include any information on the "net gain to Canada" resulting from

the operation of the centres. Therefore, no attempt will be made to compute B/C ratios from a national perspective.

9.0 CONCLUSIONS

The benefit-cost methodology and results offer the following general guidelines for assessing the effectiveness of the tourist information centres in British Columbia:

1. On average, 100 tourist parties can be expected to generate 30 personal inquiries at information centres in the province.

2. Out of 100 personal inquiries, 30 can be expected to result in additional tourism expenditures in the province. Most of these are expected to add attractions rather than lengthen the duration of the trip.

3. Each personal inquiry can be expected to generate $10.15 in additional tourism expenditures, and $1.827 in net economic benefits to the total BC society. Additional benefits could result from the centres' effects on repeat visitations and positive word-of-mouth advertising, but these benefits are difficult to quantify and to separate from the impacts of other factors.

4. Very small centres with personal inquiries of 7,000 or less typically will not be economically feasible.

5. Small centres with personal inquiries in the range of 7,000 to 30,000 will often be able to cover their costs of operation but may find it difficult to support a major capital investment. This size of centre is much more attractive from a local perspective than a provincial perspective.

6. This methodology may tend to overstate the net economic benefits generated by smaller centres. This could occur if the "area of influence" of a smaller centre overlaps with the area of a larger centre. In this situation, a tourist may be able to get the same information from a larger centre.

7. Medium to large centres with personal inquiries of 30,000 or more are generally economically attractive, as long as capital costs are not too excessive. Moreover, the results in Exhibit I may tend to understate the viability of larger centres. Compared with smaller facilities, larger information centres may be able to encourage a larger proportion of tourists to leave the highway and may be able to influence a larger number of visitors to change their travel plans.

8. It may be desirable in economic terms to amalgamate two or more centres into one larger centre. Amalgamation could be particularly attractive in the case of a Tourist Region with a comparatively large number of smaller centres. Amalgamation may be desirable even when the capital costs of the existing centres have already been "written off". However, each situation would need to be analyzed separately, using the methodology described in this Appendix.

9. A new centre can be justified from a provincial perspective only if there is clear evidence that the new centre will not significantly reduce visitations at existing information centres.

10. The economic viability of a centre can be questioned when the annual operating budget exceeds total personal inquiries by a factor of two or more.

APPENDIX E

PERSONAL CONTACTS MADE DURING THE STUDY

APPENDIX E

PERSONAL CONTACTS MADE DURING THE STUDY

Organization	Contact
Local TICs, Sponsors, and Businesses	
Campbell River Centre	Ray Ludford, Centre Manager, Manager of Campbell River and District Chamber of Commerce
	Hubert Breukers, Owner of Lana Dee Style Shop
	Dan Bell, Owner of Dan Bell Floor Covering Ltd.
	Glen Thulen, Owner of Pioneer Hardware Ltd. and Pioneer RV Centre
	Donald McLeod, Owner of Travel Agency - Pathfinder Travel
Gibsons Centre	Patricia Fromager, Centre Manager
	Peter Philpotts, President of Gibsons Chamber of Commerce
Golden Centre	Paul Wortley, Owner of Smitty's restaurant
	Jack Debow, Owner of Jack Spratt's restaurant
	Bruce Jennejohn, Manager of the Bank of Montreal
	Sandy Ross, Executive Secretary of Golden Chamber of Commerce
	Jeff Dreer, Owner of Glacier Raft Co.
	Rick Horte, Manager of Evans Forest Products
	Jerry Andrews, Owner of Mary's Motel
	Em McPhail, Owner of Arl Inn Towner

Organization	Contact
Kamloops Centre	Marg Black, Centre Staff Supervisor, Assistant Manager of Kamloops Visitors and Convention Bureau
	John Frost, Owner of antique shop - The Flag
	Doris Soncar, Information Officer at the Aberdeen Shopping Mall
	Bill Cook, Manager of the Aberdeen Mall
	Glen Charlesworth, Owner of Hospitality Inn
Kimberley Centre	Frank Goodwin, Executive Vice President of Kimberley Bavarian Society
	Rod McCloud, President of Kimberley Bavarian Society
	Don Finnestad, Manager of Canada Drug Mart, Owner Travel Agency - In Tours Canada Inc.
	Bill Livingston, Owner of the Silver Birch, The Rocky Mountain, and The Purcell resort accommodation facilities
Nanaimo (Main) Centre	Kay Hudspeth, Centre Manager, Manager of Greater Nanaimo Chamber of Commerce
Nelson Centre	Phil Pearsall, Centre Manager, Manager of Nelson and District Chamber of Commerce
New Hazelton Centre	Denise Lizotte, Summer Staff Supervisor of Centre
	Carmen Sadlemyer, President of New Hazelton and District Chamber of Commerce
Parksville Centre	Pat Brown, Centre Manager, Manager of Parksville and District Chamber of Commerce

Organization	Contact
Penticton Centre	Ross Axworthy, Centre Manager, Executive Manager of Penticton Chamber of Commerce
Prince Rupert Centre	Judy Culp, Executive Director of Prince Rupert Visitors and Convention Bureau
	Peter Lestor, Mayor of Prince Rupert
	Joan Hicks, Owner of Joans Flowers
	John Rogers, Owner of the Yarn Shop and The Shutter Shack
	Steven Smith, Owner of Stone's Mens Wear, Alderman
Radium Centre	Doug McIntosh, Owner of Radium Hot Springs Golf Resort, Past President of Rocky Mountain Tourist Association, President of Tourist Industry of BC, Director of Radium Business Association (Centre Sponsor)
Salmon Arm Centre	Lori Navey, Summer Staff Supervisor of Centre
	Ian Wickett, President of Salmon Arm and District Chamber of Commerce
Sidney (Main) Centre	Peter Tredgett, Centre Manager, Manager of Saanich Peninsula Chamber of Commerce
Vernon Centre	Glenna Cheeseman, Summer Staff Supervisor of Centre
	Roslyn Castleden, Manager of Vernon and District Chamber of Commerce
	Roy Collings, President of local Motel Association
	John Williams, Manager of the Village Green Inn

Organization	Contact
	Len Johnson, Owner of Blue Stream Motel
	Jack Ash, Owner of the Sundowner Restaurant
Victoria (GVVIC) Centre	Donald Nixon, Centre Manager
	Rita Wilson, President of Greater Victoria Visitors Information Centre
	Ron Grant, Manager of Royal Scott Motor Inn, Past President of GVVIC
	Les Wood, Manager of Undersea Gardens, Past President of GVVIC
	Bill Wellburn, Manager of Olympia Hotel
	Joan Bomford, Owner of a gift shop - The Gallery, Executive of the Downtown Merchants Association
	Donald Campbell, Manager of The Princess Mary restaurant
Whistler Centre	Susan MacLaurin, Summer Manager of Centre
	Jenny Busdon, Secretary of Whistler Chamber of Commerce
Williams Lake Centre	Linda Campbell, Summer Staff Supervisor of Centre
BC Operated TICS	
Douglas BC Centre	Mark Gelfond, Centre Supervisor
Golden BC Centre	Julie Metcalf, Centre Supervisor
Osoyoos BC Centre	Marlyn Daniels, Centre Supervisor
Robson Square BC Centre	Jill Jacobsen, Center Supervisor

Organization	Contact
Other Business Organizations	
BC Chamber of Commerce	Bill Goldie, General Manager of BC Chamber of Commerce
	Dan Doswell, General Manager of Tsawwassen Inn
BC Telephone	Rosemary Wright, Telidon Representative
Expo 86	Donald McConachie, Vice President
Miller Computing Services Ltd.	Ian Miller, President
Regional Tourist Associations	
Region A	Joyce Brookbank, Manager of the Vancouver Island Publicity Bureau
Region B	Graham Bell, Manager of the Southwestern BC Tourist Association
Region C	Bob Sheeley, Manager of the Okanagan-Similkameen Tourist Association
Region D	Duncan Myers, Manager of the Thompson Country Tourist Association
Region E	Elaine Reiben, Manager of the Kootenay Boundary Visitors Association
Region F	Hugo Stahl, Director of the Cariboo Tourist Association, Director of Williams Lake and District Chamber of Commerce
Region G	Wendy Moore, Manager of the British Columbia Yellowhead 16 Tourist Association
Region H	Dick Sequens, Manager of the Peace River-Alaska Highway Tourist Association
Region I	Don Foxgord, Manager of the BC Rocky Mountain Visitor Association

Organization	Contact
Government	
Parks Canada	Anne Ormerod, Visitor Services Officer in Recreation
Department of Regional Industrial Expansion	Peter Maundrell, Tourism Development Officer
Tourism Canada	David Jago, Supervisor of Travel Information Services
Government of BC Ministry of Industry & Small Business Development	David Eggleston, Director of Business Development
	Michael Pasztor, Research Officer
Government of BC Ministry of Tourism	Rick Lemon, Director of Educational Services
	Barry Lee, Assistant to Director of Tourist Marketing Services
	Doug White, Research Officer
	Joan Thomas, Research Officer
	Wayne Carter, Director of Visitor Services
	Gail Dennison, Manager of Information Centres
Government of Alberta Tourism and Small Business	Barry Salter, Director of Marketing Services
	Barbara Spencer, Manager of Tourist Information Centres
Government of Saskatchewan Tourism and Small Business	Leona Gorr, Director of Marketing Services
Government of Manitoba Economic Development and Tourism	Gary Goosen, Coordinator of Travel Information Services
Government of Ontario Ministry of Tourism and Recreation	Carol Churchill, Manager of Customer Sales and Services
Government of Quebec Industry, Trade & Commerce	Odette Boisbriand, Manager of Tourism Office for Quebec City

Organization	Contact
Government of New Brunswick Department of Tourism	Bill Kilfoil, Travel Information Supervisor
Government of Nova Scotia Department of Tourism	Jack Kerr, Manager of Travel Centres
Government of Prince Edward Island, Department of Tourism and Finance	Phyllis McKenzie, Administration Officer
Government of Newfoundland Department of Tourism	Derrick Johnston, Manager of Visitor Services
Government of Northwest Territories, Department of Economic Development and Tourism	Cecille Ward, Travel Counselling Officer